

CASE STUDY

Transforming B2B Collections Through a Managed Nearshore Service Model

EXECUTIVE SUMMARY

As organizations grow, finance leaders face increasing pressure to improve working capital while controlling operating costs. While traditional staff augmentation can provide additional capacity, it often falls short of delivering the operational accountability, governance, and continuous improvement required to create lasting business value.

*This case study highlights how one **InvestMatch Accelerator Partner** helped a leading **U.S. wholesale distributor** transform its B2B collections operation by implementing a fully managed nearshore service model.*

CLIENT PROFILE

Industry

Wholesale Distribution

Client

Leading U.S. spirits and wines distributor operating across 29 U.S. markets

Business Objective

Improve collections performance while reducing operating costs and creating a more disciplined, scalable accounts receivable operation



The engagement reduced operating costs by **31%**, generated more than **\$332,000 in savings** within the first 7 months, significantly improved collections performance, and established a scalable operating framework supporting **29 operating markets**.



BUSINESS CHALLENGE

The client's collections operation had evolved over many years but was no longer delivering the consistency and operational performance required to support continued growth.

Collection practices varied across markets, receivables continued to age beyond acceptable thresholds, reporting lacked visibility, and operational controls were inconsistent. Leadership recognized that simply increasing headcount would not address the underlying issues. A new operating model focused on accountability, governance, and continuous performance improvement was required.

THE SOLUTION

Our **Accelerator Partner** implemented a fully managed nearshore collections service designed around operational ownership rather than traditional staff augmentation.

By assuming responsibility for day-to-day delivery while introducing standardized processes, executive reporting, governance, and continuous improvement, the engagement created a scalable operating model capable of supporting long-term business growth.

SOLUTION HIGHLIGHTS

- End-to-end B2B Collections Management
- Accounts Receivable Research
- Cash Application Services
- Root Cause Analysis of Payment Delays
- Standard Operating Procedures across 29 Markets
- Executive KPI Reporting with Microsoft Power BI
- Weekly Governance & Accountability Reviews
- Ongoing Quality Assurance & Continuous Improvement

Prior to implementation, every collections professional successfully completed certification and operational readiness requirements to ensure a seamless transition.



BUSINESS OUTCOMES

FINANCIAL IMPACT

31%

Reduction in Operating Costs

\$332K

Savings Realized in the First
11 Months

WORKING CAPITAL IMPROVEMENTS

40%

Reduction in Outstanding Receivables

\$10M → \$6M

Reduction in Receivables
(Atlanta Operation)

OPERATIONAL EXCELLENCE

0%

Employee Turnover
During Transition

100%

Collection Agents
Certified Before Go-Live

WEEKLY

Executive Performance
Reviews

29

Markets Operating
Under Standardized
Procedures

POWER BI

Executive KPI Dashboards
& Performance Reporting



WHY THE ENGAGEMENT SUCCEEDED

Rather than expanding the existing workforce, the organization adopted a managed service model built around operational ownership, standardized processes, governance, and measurable performance management.

This approach delivered more than labour cost savings. It improved operational consistency, strengthened executive visibility, reduced management burden, and established a scalable collections function capable of supporting future growth.

The result was a more disciplined finance operation with stronger accountability, improved cash flow, and a framework for continuous operational improvement



ABOUT THE INVESTMATCH ACCELERATOR COMMUNITY

This case study highlights the capabilities of one of the trusted organizations within the InvestMatch Accelerator Community.

Our Accelerator Community brings together carefully selected firms with proven expertise across managed services, nearshoring, AI, business operations, digital transformation, technology implementation, and strategic consulting.

Each Accelerator Partner is evaluated not only for technical expertise, but also for delivery capability, operational maturity, and a commitment to measurable client outcomes.

While every client engagement is unique, this case study illustrates the calibre of operational excellence organizations can access through the InvestMatch Accelerator Community.



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