

# SBV Driving Operational Visibility & Accountability with monday.com

## CHALLENGE:

### LIMITED VISIBILITY & MANUAL PROCESSES

#### KEY CHALLENGES INCLUDED:

- ✗ Work managed via emails and static task lists
- ✗ No visibility into process stages or bottlenecks
- ✗ Difficulty measuring workload and reporting progress

## THE SOLUTION:

### MONDAY.COM FOR FINANCE WORK MANAGEMENT

Working with The CRM Team, SBV's Finance division fully digitized its core processes using monday.com.

#### KEY SHIFTS INCLUDED:

- ✓ Migration of to-do lists, task tracking, and interdepartmental interactions into centralized Boards
- ✓ Establishing real-time visibility into every stage of work
- ✓ Creating dashboards and workflows across AP, Payroll, and Compliance functions

Finance teams now have full ownership and visibility across all activities—from payment processing and payroll inputs to reconciliations and compliance submissions.

Ready to streamline your operations like SBV?

Book a free consultation with The CRM Team today.

**BOOK NOW**

## KEY AREAS NOW MANAGED IN MONDAY.COM



**Accounts Payable:**  
Payment workflows, tracking, balance sheet recons



**Payroll:** Input tracking, returns, third-party payments, manual consolidations



**Training & Rosters:**  
Upskilling records, payslip printing, manual payment schedules



**Compliance:** Statutory submissions, system access reviews, company-wide balance sheet reviews

## IMPACT & MEASURABLE IMPROVEMENTS



**Productivity:** Teams work more efficiently with clear handoffs and load balancing



**Accountability:**  
Enhanced due to real-time task ownership and audit trails



**Bottlenecks Resolved:**  
Visibility allows work reallocation before delays escalate



**Reporting:** Faster, data-driven insights without reliance on static spreadsheets

*"We now prevent bottlenecks before they occur and reassign tasks with clarity. Accountability has drastically improved thanks to monday.com's visibility."*

## ADVICE TO ENTERPRISES WITH INTERNAL CONTROLS

- ✓ **Dedicate time** for team onboarding and tool exploration
- ✓ **Appoint internal champions** to drive board design and governance
- ✓ **Use training and coaching** to embed adoption in day-to-day use

*"monday.com isn't just a tool—it's a way to bring structure, collaboration and control into finance operations."*

## CONCLUSION

By adopting monday.com through The CRM Team, SBV's Finance department has successfully transitioned from manual, email-based workflows to a fully digitized, transparent, and accountable system. The shift has led to measurable improvements in productivity, reporting efficiency, and process visibility across key financial functions such as payroll, accounts payable, and compliance reporting. With better workload management, improved team collaboration, and real-time data insights, SBV Finance is now empowered to operate with greater agility and precision. This transformation stands as a clear example of how enterprise finance teams can embrace digital tools to enhance operational excellence and governance.