

# M<sup>3</sup> Strategy & Solutions

## Project Management Support

Firms continue to face growing pressure from regulators, clients, and internal stakeholders making effective project management a critical enabler of audit quality and operational excellence.

### Ineffective project management can lead to:

- ✗ Failure to meet business objectives and inefficient use of resources
- ✗ Poor stakeholder involvement and lack of accountability
- ✗ Missed deadlines and budget overruns
- ✗ Inconsistent coordination and lack of clarity
- ✗ Poor team or client experience

**Our Solution:** Support firm-wide strategic deployments and drive project management within the audit process.

- ✓ Serve as the dedicated PMO for key projects, providing end-to-end oversight and coordination.
- ✓ Establish or enhance a project specific or organizational project management office.
- ✓ Design and stand up a scalable Project Management capability for audit teams to leverage.
- ✓ Advise on a standardized, fit-for-purpose project management approach tailored for audit environments.
- ✓ Co-develop project management collateral including templates, toolkits, and training materials to drive consistency and adoption.

## Why MSS?

Our support draws on deep experience managing firm-wide organizational change projects and initiatives. We also have developed a scalable PM framework tailored for assurance environments that supports audit delivery and quality that was deployed to thousands of audit professionals. The result is a repeatable, structured engagement management approach that improves quality and efficiency across all teams.

**Project management needs to be top of mind through all phases of the audit. Some examples include...**

### 1. Planning

Budget and Resource Scheduling.



### 2. Execution

Coordination between stakeholders and keeping work on track.



### 3. Monitoring & Adjustment

KPI monitoring and adjustment to the plans and budgets.



### 4. Close-Out

Remediation of issues and debrief.

## Key Benefits

### For the Engagement Teams:

- ✓ Improved efficiency and reduced rework
- ✓ Enhanced team coordination and clarity
- ✓ Real-time visibility into progress and risks
- ✓ Accountability at every stage of the audit
- ✓ Stronger client experience through organized communication and delivery

### For the Firm:

- ✓ Higher audit quality and improved service delivery model
- ✓ Consistency across engagements
- ✓ Scalable processes that adapt to audit complexity
- ✓ Cost savings
- ✓ Leadership insight through defined metrics and reporting



## Led by Industry Experts



**Bill Tomazin**

Former COO of KPMG's U.S. Audit practice, overseeing a \$4 billion professional services business with over 9,000 U.S. employees and 3,000 offshore employees. Instrumental in driving quality management solutions and innovation and transformation platforms.



**Mike Keys**

Former global lead audit partner, national audit partner-in-charge of growth and client experience with extensive experience in quality management, audit process improvement, operational efficiency, growth, and client experience.



**Alicia Forte**

With over 15 years at two Big 4 firms, she's a certified Lean Six Sigma Green Belt and a recognized leader in CI. Her expertise in audit transformation, project and change management has powered strategic initiatives that boost efficiency, streamline processes, and drive operational excellence.

## Contact Us



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