

From Multi-Year Backlog to Full Reconciliation: Global Clinical Research Leader Regains Financial Clarity and Compliance Control



THE CHALLENGE

- **Unreconciled accounts since 2016** — Years of pending reconciliations created mounting compliance risk and revenue uncertainty
- **High turnover disrupting continuity** — Frequent attrition caused loss of institutional knowledge and inconsistent processes
- **Shortage of specialized expertise** — Difficulty finding talent with combined knowledge of medical terminology, R&D billing, and clinical trial finance
- **Fragmented third-party billing** — No standardized process to integrate vendor invoices with internal billing systems

OUR SOLUTION



Deep-Dive Discovery & Collaboration

Retrieved historical reconciliation data and partnered with client SMEs to map trial-specific billing nuances and establish a clear baseline



Third-Party Billing Integration

Standardized vendor invoice data and aligned sales items within internal systems creating a single source of truth for billing accuracy



Reconciliation Control Framework

Built structured workflows to systematically compare third-party and internal billing, enabling rapid identification and resolution of discrepancies

IMPACT

01

Backlog Eliminated — Successfully reconciled multi-year accounts dating back to 2016, clearing all outstanding reconciliations

02

Revenue Recovery — Identified billing gaps enabling the client to invoice for previously missed charges, recovering revenue at risk of permanent loss

03

Compliance Strengthened — Enhanced control, transparency, and regulatory adherence while improving billing accuracy and process efficiency