



cardea

Experts in  
Meta-Consulting.

# SCREENING, EVALUATION & SELECTION OF MANAGEMENT CONSULTANTS

SELECTED PROJECT  
REFERENCES  
2024

# REFERENCE #1: TALENT ACQUISITION & CANDIDATE EXPERIENCE

Pharma-Company, Germany (>6'000 employees)

## Background

### Initial situation

- As part of a process mining project (based on Celonis) "H2R Phase 1: Recruiting", the recruiting process (from job publication to employee creation) was analyzed and made transparent in terms of throughput times and first time right. A concept and implementation project was initiated on the basis of the potential identified
- The focus is on the conception and fundamental redesign of the process and the systemic implementation with integration of the SuccessFactors (SF) system as well as the definition of future roles and cooperation between the systems concerned (SF, website, applicant management tool).



## Services Cardea

- Coordination & development of the initial project situation, project scope, project goals and expected results
- Preparation of RFP (Request for Proposal)
- Identification of the long list of potential consulting providers (15 providers from the segments "management & HR consulting", "(SAP) transformation, process & technology consulting", "HR digitalization consulting")
- Implementation of all activities from the long to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 5 providers (creating transparency and comparability of the different services, experiences and project approaches)
- Organization and support of the beauty contests/pitches with 3 providers
- Sparring for the final selection of the most suitable consulting firm ("best match")



## Key project results

- Definition of the specific business challenges and derivation of the necessary external expertise
- Translation of the project objectives and expected results into detailed requirements for potential consulting companies
- Identification and presentation of different consulting approaches and solutions and development of the "best match"
- Recommendation and selection of consultants who not only have the necessary expertise, but also fit perfectly with the organization and culture



# REFERENCE #2: TRANSPARENCY ABOUT COSTS, COST DRIVERS & OUTPUT

Insurance-Company, Switzerland (3'000 employees)

## Background

### Initial situation

- For >10 years, the company has made considerable progress in terms of administrative costs. The administrative cost budget has been increased by around CHF 50 million for 2024 due to various factors. For the first time in years, the administrative cost rate will therefore increase
- The aim of the project is to achieve transparency about which financial and human resources are used for which tasks and activities in the organizational units and what output is achieved with these resources.



## Services Cardea

- Coordination and development of the initial project situation, project scope, project objectives and expected results for the preparation of the RFP (Request for Proposal)
- Identification of the long list of potential consulting providers (15 providers from the segments "Finance & Controlling", "Restructuring & Performance Improvement", "Auditing & Cost Optimization")
- Implementation of all activities from the long to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 6 providers (creation of transparency and comparability of the different services, experiences and project approaches)
- Organization and support of the beauty contests/pitches with 3 providers
- Sparring for the final selection of the most suitable consulting firm ("best match")



## Key project results



Definition of the CFO's specific expectations and derivation of the necessary external expertise

Translation of the project objectives and expected results into detailed requirements for potential consulting companies

Making the approaches of large strategy consultancies, auditors, financial advisors and boutique providers comparable

Recommendation and selection of consultants who offer a project approach and skills that perfectly match the organisation and culture

# REFERENCE #3: LEAN TRANSFORMATION IN QUALITY CONTROL(„LEAN LAB“)

Pharma-Company, Germany (>6'000 employees)

## Background

### Initial situation

- The company has several laboratory groups and teams at 4 locations in Germany for the performance and evaluation of physico-chemical, biochemical and microbiological quality control tests on excipients, medicinal products, active ingredients, intermediates, packaging materials and production aids
- Based on the 5S methodology, which is already established in the laboratories, the lean transformation of quality control is intended to lay the foundation for the “laboratory of the future” with the aim of increasing productivity within the QC laboratories to meet future growth



## Services Cardea

- Coordination & development of the initial project situation, project scope, project goals and expected results for the preparation of the RFP (Request for Proposal)
- Identification of the long list of potential consulting providers (15 providers from the segments “Lean Transformation & Lean Labs”, “Operational Excellence”, “Digitalization & QC Process Optimization”)
- Implementation of all activities from the long to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 5 providers (creation of transparency and comparability of the different services, experiences and project approaches)
- Organization and support of the beauty contests/pitches with 4 providers
- Sparring for the final selection of the most suitable consulting firm (“best match”)



## Key project results



Definition of special requirements for consultants for client empowerment through training & education and change management

Identification of consulting companies with a mix of industry knowledge & technical expertise in the field of quality control/laboratories

Establishing the comparability of the approaches & deriving the appropriate procedure (“big bang” vs. “pilot” for the “best match”)

Recommendation and selection of consultants to ensure sustainable implementation of the lean philosophy (incl. global rollout)

# REFERENCE #4: WEBSITE DEVELOPMENT, LEAD-/ DEMAND GENERATION & MARKETING AUTOMATION

Bank (Asset management, banking, pensions and real estate), Switzerland (100 employees)

## Background

### Initial situation

- The structure and navigation of the current website is not sufficiently aligned with the respective customer journeys. The visual design and imagery do not fully reflect the brand values and identity. The customer experience is still suboptimal and targeted elements of customer interaction (call to action) are partially missing
- The project aims to redesign the website with a particular focus on the potential for lead & demand generation and the integration of peripheral systems (CRM, marketing automation, analytics & marketing performance tracking)



## Services Cardea

- Coordination & development of the initial project situation, project scope, project goals and expected results for the creation of the RFP (Request for Proposal)
- Identification of the long list of potential agencies (20+ providers from the areas of web design, branding, UX/UI design & digitalization (CMS, marketing automation, CRM, SEO, analytics)
- Implementation of all activities from the long to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 4 agencies (creating transparency and comparability of the different services, experiences and project approaches)
- Organization and support of the beauty contests/pitches with 3 providers
- Sparring for the final selection of the most suitable agency ("best match")



## Key project results



# REFERENCE #5: OUTSOURCING CUSTOMER-RELATED COMPLIANCE (KYC, AML)

Custodian Bank, DACH

## Background

### Initial situation

- As part of a “Build the Bank” project to establish a new Swiss representative office, the custodian bank is looking for providers of Finma-compliant compliance outsourcing services for end clients who are opened, managed and onboarded online by uVVs from Germany and/or Switzerland



## Services Cardea

- Coordination & development of BPO requirements and scope for the creation of the long list requirements specification
- Identification of the long list of potential business process outsourcing providers with services in the area of:
  - Managed services (assumption of the risk and compliance function and/or the tasks of the internal anti-money laundering office)
  - Advisory & operational support for Risk & Compliance Managers, Advisory Financial Services (Regulatory & Compliance)
  - Risk Management Services
  - IT-support/ SW solutions for Compliance
- Presentation of the evaluation results and short list recommendation with 3 BPO providers (creation of transparency and comparability of the different services & price models)
- Sparring on the final selection of the most suitable providers (“best match”)



## Key project results

Definition of the specific business challenges and derivation of the necessary external services & expertise

Identification of BPO providers with a mix of industry knowledge & technical expertise in the area of regulatory & compliance

Establishing the comparability of BPO services & other advisory competences

Recommendation and selection of BPO providers that best match the requirements in terms of services and price models

# REFERENCE #6: STRATEGY DEVELOPMENT & POSITIONING PAPER

Machine & plant engineer, Switzerland (5'000 employees)

## Background

### Initial situation

- The company was acquired and integrated into the components division of a leading supplier of spinning technology. As part of the parent company's upcoming annual strategic planning process (STP), the company is in the process of defining its path and goals for the coming years
- The company's CEO wants to define the 2025 strategy paper and obtain tools to not only monitor, review and adjust the strategy on a regular basis, but also to connect to the parent company's financial reporting system



## Services Cardea

- Coordination & development of the initial project situation, project scope, project objectives and expected results for the preparation of the RFP (Request for Proposal)
- Identification of the long list of potential consulting firms (10 providers with different positioning and expertise in the areas of strategy, financial management, operations and industry knowledge)
- Implementation of all activities from the long list to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 5 consulting companies (creation of transparency and comparability of the different services, experiences and project approaches)
- Organization and support of the beauty contests/pitches with 4 providers
- Sparring for the final selection of the most suitable providers ("best match")



## Key project results



Definition of the specific business challenges and derivation of the necessary external services & expertise

Identification of providers with a mix of industry knowledge & technical expertise in the areas of strategy, finance & operations

Establishing comparability of the experience & approaches of specialised boutique strategy consultancies

Recommendation and selection of consultants with the most comparable experience and in-depth industry knowledge

# REFERENCE #7: DATENMANAGEMENT MAKE-TO-ORDER-PROCESS (PLM & SYSTEM-TASK SPLIT)

Pharma-Company, Germany (>6'000 employees)

## Background

### Initial situation

- Various initiatives are planned as part of the company's digital roadmap: Analysis & concept for (1) task distribution between ERP (SAP, migration to SAP S/4 Hana planned), MES & LIMS, (2) PLM, (3) integration layer and (4) analytics platform
- The master data required for the make-to-order process is currently created, maintained and updated in various systems (ERP, MES, LIMS). The master data processes are also inconsistent and largely manual
- The advertised project deals with the structuring and definition of a standardized master data process and master data as well as the division of tasks between the ERP, MES and LIMS systems



## Services Cardea

- Coordination & development of the initial project situation, project scope, project objectives and expected results for the preparation of the RFP (Request for Proposal)
- Identification of the long list of potential consulting companies (20+ providers from the segments "(SAP) transformation, process & technology consulting", "management & digitalization consulting", "life science industry specialists")
- Implementation of all activities from the long to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 6 consulting companies (creation of transparency and comparability of the different services, experiences and project approaches)
- Accompanying the beauty contests/pitches with 4 providers
- Sparring for the final selection of the most suitable providers ("best match")



## Key project results



# REFERENCE #8: DIGITALE TRANSFORMATION & DEVELOPMENT OF MULTIMEDIA OFFERINGS

Media Company, Switzerland (>3'000 employees)

## Background

### Initial situation

- The media world is undergoing a major upheaval, moving away from linear to digital and multimedia business models. In response to this situation, a transformation project was launched with the aim of becoming a modern media company with an increasingly digital focus
- The project focuses on the development of sub-strategies for multimedia offerings, the development of action plans, the development and establishment of processes, the further development of process management and the development of a target image



## Services Cardea

- Cardea's task was to search for and identify suitable external providers and create a corresponding long list (12 consulting providers) as well as to prioritize the consulting firms and create the short list for the RFP process by pre-qualifying 7 consulting providers on the basis of personal interviews
- The main requirements for the consultants were:
  - Experience in transformation projects, strategy development and process development, knowledge and application experience in methods for idea generation, prioritization and decision-making
  - Experience in developing strategies for media companies or media products
  - Agile process management, strategic process organization and process management development
  - Project management with knowledge of methods (minimum: Kanban, Lean Management, OKR)
  - Facilitating C-level workshops & communicating operational changes for different target groups



## Key project results



# REFERENCE #9: REVIEW OF PROCESSES & SYSTEM LANDSCAPE

## E-Commerce/ Online trade, Switzerland (Food)

### Background

#### Initial situation

- The company currently uses various systems in the areas of ERP merchandise management, CRM, accounting, HR, ordering and marketing, with weaknesses such as missing interfaces, redundancies, manual processes or functionalities
- The core processes of processing and delivering around 2 million orders per year are currently handled by a core system that is no longer state-of-the-art and not suitable for future requirements
- A review of the system landscape should help to identify potential for increasing the efficiency and effectiveness of processes and assess the future viability of the IT infrastructure and IT systems and their integration



### Services Cardea

- Coordination & development of the initial project situation, project scope, project goals and expected results for the preparation of the RFP (Request for Proposal)
- Identification of the long list of potential consulting firms (20 providers from the segments “Technology & Operations”, “Management & Digitization Consulting”, “E-Commerce Industry Specialists”)
- Implementation of all activities from the long list to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 5 consulting companies (creation of transparency and comparability of the different services, experiences and project approaches)
- Accompanying the beauty contests/pitches with 3 providers
- Sparring for the final selection of the most suitable providers (“best match”)



### Key project results



Definition of the specific business challenges and derivation of the necessary external services & expertise

Identification of providers with a mix of industry knowledge & technical expertise in the areas of strategy, digitalisation & processes

Creation of a long list with 5 providers from strategy, digitalisation, operations / process & e-commerce consulting

Recommendation and selection of consultants who offer a project approach and skills that perfectly match the organisation and culture

# REFERENCE #10: CHANGE MANAGEMENT & COMMUNICATIONS AS PART OF THE INTRODUCTION OF GLOBAL STANDARDS FOR SAFE AND SUSTAINABLE OPERATIONS

Global active raw materials company, Switzerland (150'000 employees)

## Background



### Initial situation

- The company mines, produces and markets various raw materials for everyday goods. It operates at around 150 locations in the mining, metallurgy and oil production sectors
- As part of the introduction of a new management system, the client is planning to introduce various new standards at local and global level using an integrated approach to sustainable management of all business factors.
- The introduction of the CMS standards needs to be prepared and accompanied by a coherent communication and engagement strategy to make the transformation successful by empowering and engaging all relevant employees

## Services Cardea



- Cardea's task was to search for and identify suitable external providers and create a corresponding long list (9 providers) as well as to prioritize the consulting firms and create the short list for the RFP process by pre-qualifying 4 consulting providers
- The main requirements for the consultants were:
  - Accompanying transformations by involving employees and stakeholders and supporting them in building acceptance for change
  - Developing clear, effective communication strategies and messages that provide convincing arguments for change
  - Developing and implementing change communication media and content to achieve common understanding and alignment in announcing, promoting and pursuing change initiatives
  - Geographic coverage of Europe, North & South America and Africa markets
  - Languages: English, German, Spanish

## Key project results



Pre-qualification of potential consulting companies to enable the client to carry out the RFP process

Identification of providers with specialist expertise in the areas of transformation, change & communications and country coverage

Creation of long list with 4 providers (creative agencies, HR & transformation consultants, communication consultants)

After the RFP process, the consulting firm with the most holistic approach was selected from the long list

# REFERENCE #11: PROCEDURAL SUPPORT FOR PUBLIC TENDERING

University Hospital, Switzerland

## Background

### Initial situation

- The hospital fulfils public tasks as part of its service mandate. It is therefore subject to public procurement
- A public procurement procedure is being carried out as part of a building technology and operation project with an estimated project volume of around CHF 5 million and a projected project duration of 3 years
- The hospital is looking for an experienced procurement specialist who can support the project in the process selection, planning and preparation phase up to and including the conclusion of the award procedure



## Services Cardea

- Cardea's task was to search for and identify suitable external providers and draw up a corresponding long list (14 providers) as well as to prioritise the consulting firms and draw up the short list for the RFP process by pre-qualifying 3 consulting providers
- The main requirements for the consultants were:
  - Knowledge of the (new) public procurement law (IVöB)
  - Experience in supporting public procurement procedures (choice of procedure, planning & procedure, requirements management, preparation/review of tender documents with regard to completeness, scope, etc., evaluation and award criteria, evaluation)
  - Methodological and technical knowledge to develop, define and implement/accompany submission processes
  - Experience with tenders in the field of building technology and operation
  - Industry knowledge in healthcare & public institutions



## Key project results



Pre-qualification of potential consulting companies to enable the client to select consultants efficiently



Identification of providers with industry & technical expertise in the area of procurement & tendering procedures

Creation of long list with 3 providers (procurement consultants, industry specialists focussing on tenders & evaluations)

The consulting company with the most similar project experience was selected from the long list

# REFERENCE #12: DIGITALIZATION STRATEGY, DIGITAL FOCUS AREAS & ROADMAP

Leading provider in cable car construction, Austria (>3'000 employees)

## Background

### Initial situation

- After a significant slump in sales, the company is back on a growth path
- In order to support growth in the long term, the company is looking for new strategic impetus, particularly with regard to the cross-sectional function of digitalization
- The aim of the project is to shed light on digital activities both externally and internally and to develop a clear strategy, outline a digital target image, define focus areas and create an implementation roadmap



## Services Cardea

- Cardea's task was to search for and identify suitable external providers and draw up a corresponding long list of 5 pre-qualified consultancy providers
- The main requirements placed on the consultants as part of the development of the digitalisation strategy were :
  - Ensuring the competitiveness of products and services and creating additional customer benefits
  - Utilisation of customer & process data to ensure quality, improve products, expand services for customers and make our own value creation more efficient
  - Reduce costs - in the infrastructure, at process level and in the indirect area
  - Ensure data networking throughout the entire process chain ("end-to-end") and avoid data redundancies
  - build up, pool and secure the know-how as well as the necessary resources and key digital skills



## Key project results



Pre-qualification of potential consulting companies to enable the client to efficiently select consultants (offers & pitches)

Identification of providers with industry & technical expertise in the areas of digitalisation, strategy, innovation and operations

Creation of long list with 5 providers (management & digitalisation consultants, data/customer-centric transformation consultants)

The consulting company with the clearest and most innovative approach was selected from the long list

# REFERENCE #13: OPTIMIZATION OF THE DIGITAL MARKETING PROCESS FOR NEW CUSTOMER ACQUISITION

Leading retail & investment bank, Austria (45'000 employees)

## Background

### Initial situation

- In Austria, the company is a leading corporate and investment bank for the country's top 1,000 corporate clients. In CEE, its subsidiaries cover de facto the entire region: 14.2 million customers are served in around 2,600 branches in the corporate and private customer segment as well as in investment banking
- The focus of the project is to understand customer behaviour when searching for and purchasing financial products in the digital space, with the aim of increasing the lead-to-deal conversion rate and improving the efficiency of digital customer acquisition in order to attract new prospects to the bank with the right digital marketing channel mix



## Services Cardea

- Cardea's task was to search for and identify suitable external providers and draw up a corresponding long list (18 providers) as well as to prioritise the consulting firms and draw up the short list for the RFP process by pre-qualifying 4 consulting providers
- The main requirements for the consultants were:
  - Development of a digital customer acquisition framework
  - Development of a performance marketing strategy
  - Definition eines agilen Marketing-Setups und Zielbetriebsmodells
  - Definition of KPIs for measuring the digital marketing process (performance marketing)
  - Development of the digital campaign framework and data-based customer approach
  - SEO & landing page optimisation
  - Digital Marketing Upskilling



## Key project results



Pre-qualification of potential consulting companies to enable the client to efficiently select consultants (offers & pitches)

Identification of providers with industry & technical expertise in the areas of digitalisation, strategy, marketing and customer experience

Creation of a short list with 4 providers (digitalisation consultants, digital agencies, brand & communication consultants)

The consulting company with the most holistic and innovative approach was selected from the long list

# REFERENCE #14: PROCESS & ORGANISATIONAL EFFICIENCY, INCREASED PRODUCTIVITY, AUTOMATION

Energy Company, Netherlands (4'500 employees)

## Background

### Initial situation

- The company is in the midst of a major energy transition program in response to an extremely dynamic and changing environment. As part of this programme, the company is to divest assets in order to accelerate the transition to a future portfolio and streamline the organization
- The project relates to the Legal, Compliance & Data Protection organisational units, which were given a "fit for purpose" target as part of the restructuring process
- To achieve this goal, the department must be reviewed for process and organisational efficiency, team productivity and process automation



## Services Cardea

- Cardea's task was to search for and identify suitable external providers and draw up a corresponding long list (17 providers) as well as to prioritise the consulting firms and draw up the short list for the RFP process by pre-qualifying 8 consulting providers
- The main requirements for the consultants were :
  - Identification of realisable cost-saving potential by increasing process and organisational efficiency, team productivity and process automation
  - Definition of the target operating model to increase customer benefits and align with future tasks
  - Creating a "healthier" organisational structure to manage workload (doing the right things and doing things right)
  - Definition of metrics to support implementation monitoring and continuous improvement



## Key project results



Pre-qualification of potential consulting companies to enable the client to efficiently select consultants (offers & pitches)

Identification of providers with industry & technical expertise in the areas of cost analysis/ SG&A, performance & process optimisation

Short list with 3 providers (transformation & restructuring consulting for legal, compliance, risk & business operations)

The consultant with the best methodology and the most suitable industry and project references was selected from the long list



# REFERENCE #15: DIGITALISATION OF PURCHASING PROCESSES & SELECTION OF E-PROCUREMENT SUITE

High-Tech Company, Germany (4'000 employees)

## Background

### Initial situation

- With its international focus, large volumes and diversified product range, the company is a major purchaser of electronic and mechanical components. With an annual volume of more than €300 million in direct material, 3,000 suppliers and 12,000 materials, the purchasing department is active on the global procurement markets
- The company initiated a programme to digitalise processes and tools for purchasing. The main objective of this programme is to find the right SRM & e-procurement full-service provider to implement a platform-based solution that is also connected to the SAP ERP system



## Services Cardea

- Coordination & development of the initial project situation, project scope, project goals and expected results for the preparation of the RFP (Request for Proposal)
- Identification of the long list of potential consulting companies (19 providers from the segments "procurement consulting", "digitalisation & technology consulting", "IT (SAP) transformation consulting")
- Implementation of all activities from the long to the short list recommendation (provider briefing, obtaining offers, team interviews, evaluation & assessment, reference check, short list definition)
- Presentation of the evaluation results and short list recommendation with 5 consulting companies (creation of transparency and comparability of the different services, experiences and project approaches)
- Accompaniment of the beauty contests/pitches with 3 providers
- Sparring on the final selection of the most suitable providers ("best match")



## Key project results



Definition of the specific business challenges and derivation of the necessary external services & expertise

Identification of providers with a mix of industry knowledge & technical expertise in the areas of purchasing, digitalisation & processes

Establishing comparability of the experiences & approaches of technology & management/purchasing consultancies

Recommendation and selection of consultants with a clear methodology, holistic approach and clear vision for suitable realisation