

CASE STUDY

LEADING SENIOR LIVING OPERATOR PARTNERS WITH QX TO BOOST ACCOUNTING EFFICIENCY

CLIENT OVERVIEW

The client is a prominent senior living operator, managing over 60 communities across eight states in the United States. They specialize in offering a blend of independent living, assisted living, and memory care services to cater to a diverse aging population.



60+ COMMUNITIES



4000+ RESIDENTS

PORTFOLIO

Independent Living | Assisted Living | Memory Care | Skilled Care Communities | Hospice Care

STREAMS IN SCOPE

Balance Sheet Reconciliation | Financial Variance Analysis | Bank Reconciliations | Divvy Credit Card- Coding and Audit | Accounts Payable Audit process | CAPEX-Adhoc Audit

TECH STACK



BENEFITS DELIVERED

- ▶ **99.8% ACCURACY** maintained across MA, AP, and BR
- ▶ **100% RECONCILIATIONS** completed on time each cycle (Balance Sheet)
- ▶ **99.74% SLA ADHERENCE** in Bank Reconciliations
- ▶ **320+ HOURS SAVED** monthly, enabling client to focus on strategic tasks
- ▶ **1-2 DAY TURNAROUND** on CAPEX audits, ensuring timely project oversight
- ▶ **100% CSAT & NPS 10**, reflecting high client satisfaction
- ▶ **10-DAY OFFSHORE RAMP-UP** with knowledge transfer in Week 1

DEEP DIVE: BUSINESS CHALLENGES, QX SOLUTIONS AND KEY BENEFITS

	CHALLENGES	QX SOLUTIONS
1	Onshore teams overloaded with transactional tasks, limiting focus on oversight.	Offshore team ramped up in 10 days with structured knowledge transfer.
2	Balance sheet and bank reconciliations lagging, with items carrying forward.	Standardized workflows and SLA reviews to keep reconciliations on schedule.
3	Lack of audit checks, risking duplicate or inaccurate invoices.	AP audits embedded to flag errors and duplicates systematically.
4	Divvy credit card transactions missing receipts/approvals, creating policy gaps.	Weekly Divvy oversight to improve compliance on receipts and approvals.
5	CAPEX reviews needing quick turnarounds, stretching limited resources.	Agile CAPEX audits completed in 1–2 days without burdening client teams.



LOOKING AHEAD

As the client scales nationwide, the offshore team is set to become a strategic extension of their finance function—supporting both execution and growth. With automation and built-in scalability, QX enables resilient, efficient operations at every stage.