



# Interim CFO Engagement Case Study

## Background

Our client needed an interim solution when their CFO provided their 2-week notice. We immediately deployed a resource to assume responsibilities and enhance processes.

## Objectives

- + Learn company accounting, processes and procedures, operations, sales, and company culture. Immediately assume responsibilities
- + Catch up past-due accounting and reconcile and review prior reconciliations
- + Assure remaining staff and company personnel that companies are solid, stable, and will continue growth and profitability

## Solutions

- + Quickly assessed strengths and weaknesses of current staff, processes, and procedures
- + Defined reporting requirements and ensured accuracy and timeliness of reporting
- + Collaborated with stakeholders to ensure collaborative environment and flow of information and ability to address company risk
- + Provided key insights into strategic plans and key performance indicators
- + Defined key job responsibilities and the characteristics desired in hiring a new permanent CFO

**Manufacturing**  
INDUSTRY

**125**  
EMPLOYEES

**\$200M**  
ANNUAL  
REVENUE

**Assumed CFO responsibilities and  
INCREASED EBITDA FROM 5% TO 6.5% IN 6 MONTHS  
by increasing sales and implementing vendor bidding  
process**