

CASE STUDY

FRACTIONAL CONTROLLER SOLUTION: EMPOWERING INTERNAL TEAMS, ENHANCING CASHFLOW, AND SAVING OVER \$80K ANNUALLY

THE COMPANY

Industry: Contractor
Entity Type: Privately Held
Annual Revenue: \$5M Employees: 25
Operating Region: Western United States

THE CHALLENGE

Despite the company's growth and profitability, the owner faced challenges with financial management. He received advice from various financial experts, but they lacked the implementation needed to drive real results. The long-term internal accounting team resisted adopting new technology and processes, further hindering progress. The owner also feared potential financial risks from inadequate internal controls.

THE SOLUTION

We conducted an initial in-depth accounting assessment, speaking with the owner and internal accounting staff. From this, we created a comprehensive roadmap to transform their financial operations. Our solution included: On-site visits to train and guide the internal accounting team Focused attention on addressing critical cash flow priorities. Implementation of strong financial internal controls

THE RESULT

We successfully streamlined the month-end close process and developed a customized 13-week rolling cash flow forecast. Our guidance helped the internal team improve accounts payable and payroll processing. The owner gained peace of mind by having a trusted resource to discuss financial challenges and make informed business decisions at a annual cost savings of over \$80K.



Expert Financial Oversight and Timely Reporting

Financials are accurately and timely prepared on an accrual basis to properly present month-end results and also timely financial and tax planning to the owner.



Risk Mitigation and Compliance

Crafted a virtual process working with the internal team to deliver accurate and accrual based financial report and analysis so management can be transparent and share results to their employees. This helps with company culture, motivation and better success.



Cost Savings and Peace of Mind

With our on-demand fractional solution, the owner gained access to experienced financial professionals—both on-site and remote—without the high cost of a full-time hire. This resulted in savings of over \$100K annually, while still benefiting from expert guidance in financial analysis and reporting.

By leveraging our fractional controller solution, the company not only improved cash flow management and internal processes but also saved time and resources that were previously bogged down by outdated systems.

Our flexible, scalable solution empowered the internal team and delivered significant financial savings, allowing the CEO to focus on business growth.

GET IN TOUCH

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