



## CASE STUDY:

# A Strategic, Collaborative Chief Financial Officer for a High-Growth Healthcare Logistics Company

## CLIENT BACKGROUND

Our client, a Texas-based company that had been profitable for 10 years, had a stable core business and several business units achieving 2-3x annual revenue growth. The company had outgrown its finance department and required a leader capable of building out the function and working as a collaborative partner to a driven, hands-on CEO.

## CHALLENGE

As a young, high-growth company, our client needed a finance leader who was both strategic and detail-oriented. Our client sought an individual for this role who could drive efficiencies and process improvements to accommodate exponential growth, define new KPIs, and assess the health of the business. The successful candidate would not only ensure that the company's financial strategies supported its goals but also know how best to integrate new best practices with existing, proven processes.

## APPROACH

CPC Talent interviewed key decision makers, including directors, the CEO, operations and HR executives, and other members of the management team, to learn about the company's special culture, its leaders' nuanced views on the ideal CFO candidate, and the CEO's management style. This important qualitative research enabled us to gain a deep understanding of the client's needs and the attributes of a successful candidate.

In a streamlined process, we developed a position description marketing the role effectively, identified a group of high-quality candidates sourced through our network, and designed a scorecard to assess and compare candidates quantitatively and qualitatively.

## RESULT

After presenting our client with a slate of highly qualified candidates who met its criteria, we identified the individual representing a perfect cultural fit. Under its new leadership, the finance team has vastly improved its reporting and has made a positive impact on operations, allowing the CEO to focus on strategy and client development.

Our customized approach allowed our client to meet, interview, and determine the best fit among only candidates who had demonstrated success in the areas it cared about most.