



CASE STUDY: Transformational CFO

CLIENT BACKGROUND

This innovative, organic, gummy vitamin company has a great combination of core science and an inviting brand, creating a bit of an eCommerce sensation. Their Founder CEO is a visionary first and foremost, building the pillars of operations to support this high growth business. After taking on their first Private Equity partners to help get the company to scale and think of a profitable exit when the time becomes right. They sell their premium products through eCommerce channels (including Amazon and Shopify), their DTC channel, and select retailers.

CHALLENGE

The company, while high growth and profitable, lacked the finance infrastructure needed to understand profitable channels more deeply. They worked with a PE owner on a high-growth, eCommerce platform they acquired from an amazing, innovative, and inspirational founder -- and needed to bring in finance professionalization asap.

APPROACH

We worked closely with the owners on defining the role then hand in hand with the CEO to assure that the areas where she was most successful would be supported by the new CFO and that the financial leader would be able to lean in where our CEO was not as strong -- strategic finance and systems.

RESULT

The CEO has declared our newly hired CFO a "rockstar" as he hit the ground running, providing the financial professionalism the company needed, Just 2 months later he called us to build his team. We placed the following roles in just under 4 weeks:

FP&A Director: High impact, strategic, with direct and applicable experience with similar hyper-growth eCommerce platforms who was really interested in this brand and setting up "from scratch" a KPI structure and management dashboards

Controller: Experienced PE-backed leader with substantial experience implementing the ERP system our client is planning to administer, along with the necessary knowledge and understanding gained from supporting similar and larger companies with financial stewardship.