

# CASE STUDY

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## Interim CFO

**INDUSTRY:** Information Technology

**BUSINESS TYPE:** B2B

### CHALLENGE

A private equity firm purchased multiple I.T. managed services companies with the intention of integrating them into one streamlined platform. The firm needed an interim CFO immediately, but they did not have time or patience to sift through scores of unvetted, mixed-quality candidates. Rather, they wanted a candidate from a targeted subset of pre-vetted, PE-grade interim CFOs that fit their very specific needs by company size, budget, industry, culture, and geography. Crucially, the firm also needed an interim CFO who both understood the I.T. MSP environment and had a proven track record of successful financial integrations.

### RESULT

The PE firm was quickly introduced to a targeted selection of interim CFOs that fit their exact needs. After interviewing a discrete number of custom-fit candidates, the PE firm chose their preferred candidate—who was able to start working within two weeks of the firm's initial outreach to us. This interim CFO quickly gained trust with the portfolio companies' leadership, successfully consolidated financial reporting across the two separate companies, and ultimately paved the way for the new permanent CFO. The PE firm was able to drive an excellent outcome without wasting time and opportunity cost.

### SOLUTION

Leveraging our founder's 20 years in private equity, we have extensive frameworks for assessing PE-grade interim CFOs. We utilize these frameworks to map, assess, monitor, and maintain deep pools of the select interim professionals that meet the private equity standard. In this instance, we interviewed the PE firm to understand their specific key criteria, and then matched these criteria to the right pre-vetted candidates from our invitation-only Intelligent Network.