

FORESIGHT CFO



**AN ESTABLISHED COMPANY PARTNERS
WITH FORESIGHT CFO TO HELP THEM
UNDERSTAND THEIR DATA, USE IT
CONFIDENTLY AND EXECUTE ON THEIR
GROWTH PLAN**

Case Study by José J. Villarino

FORESIGHT CFO

Gain Access to Capital Customers Success Story

AT FIRST SIGHT

Client Overview

- Founded in 1973
- Family Owned Business
- Best in the Area
- Excel in Sourcing Specialty Products

Solution Overview

- Financial Health Check
- Improved processes and Quality Controls
- Multi-Year Financial Flight Plan
- Review of all expenses and vendor relationships

Key Benefits

- Improved accuracy in reporting
- More efficient delivery of reports to key stakeholders
- Additional insights into project ROI's
- Improved ability to target profit improvements and confident meetings with vendors

Business Challenge

Established tech disruptor in a “traditional” business has collected billions of data points but could not harness the potential of all of that hard earned knowledge. The CEO wanted confidence in his numbers and a deep understanding of his data so that he could understand how much and what kind of investment was needed to grow.

Solution

We brought in a US based controller to understand the current accounting processes, Identify the gap, work with the current finance team to improve processes and, confidently generate monthly financial reports that are reviewed and shared with banks. In addition our Growth CFOs drew a multi-year financial flight plan to understand where were the opportunities to generate more cash.

Results

The full impact of a 3-person team:

1. Improved the accounting foundation
2. Drove a better understanding of the information available
3. Gave the CEO the confidence to focus on growth.

Because of the improved data and effective analysis, the company pushed through a series of price updates that drove revenue expansion. Finally, the CEO understood how much capital he needed to fuel his growth and began investing in additional talent.