



Your Financial Clarity Partner.

Case Study

Finance Transformation & Graduation

(PE-Backed SaaS)



Financial Blindness Post-Acquisition



The Engagement

Retained by a private equity sponsor to assess and stabilize the financial reporting function of a recently acquired, **high-velocity business** generating ~\$0M – 5M in ARR with ~50 employees.



The Visibility Gap

The company operated with fully manual, cash-basis accounting manually managed by a single individual, resulting in a ~2-month close cycle and no reliable financial infrastructure.



The Information Vacuum

Leadership lacked visibility into fundamental business drivers, including customer counts, reseller vs. direct sales mix, ARR composition, pricing structures, discounting, and overall revenue quality.



The Mission

Reconstruct financial clarity from the ground up, transition to accrual accounting, accelerate close timelines, and build a scalable finance function capable of supporting growth, operational decision-making, and an eventual exit.

GOAL: Rebuild financial infrastructure, improve visibility, and prepare for scale + exit.

Action

**Financial
Reconstruction,**



**Automation & Strategic
Enablement**

Financial Reconstruction, **Automation & Strategic Enablement.**



Foundational Rebuild

Manually reconstructed the company's customer base and revenue streams to establish a baseline understanding of business performance and key drivers.



Accounting Transformation

Transitioned the company from cash-basis to accrual accounting, standardizing financial reporting and aligning outputs with investor-grade expectations.



Close Acceleration & Process Design

Redesigned and automated the month-end close process, significantly reducing reliance on manual workflows and improving reporting consistency.

Financial Reconstruction, Automation & Strategic Enablement.

System and Data Infrastructure



Centralize customer analytics



Track pricing and discounting structures



Automate revenue recognition and deferred revenue tracking



Provide real-time visibility into ARR and operational performance

Financial Reconstruction, **Automation & Strategic Enablement.**



Decision Enablement

Developed dashboards and reporting frameworks that surfaced key insights, enabling leadership to identify areas of growth, operational inefficiencies, and strategic opportunities.



Operational & Strategic Support

Supplemented leadership with financial insights to support both operational execution and long-term strategic initiatives.

Professionalized Graduation Plan

- Led the end-to-end hiring process for a full-time finance leader, including sourcing, interviewing, and selection.
- Trained and onboarded the new hire while gradually transitioning responsibilities to ensure continuity and long-term ownership.

Results



Complete Financial Visibility

Established real-time insight into:

Customer base and segmentation

Pricing and discounting structures

ARR and revenue quality

Deferred and recognized revenue

Value Creation & Exit Outcome

Time to close the books

**5 – 7 business
days**

Increased ARR multiple by

~ 6x

on acquisition close.

Customer Testimonial

“When I joined OrgChart, finity had built a **strong financial foundation** for me — clean systems, clear reporting, and real visibility into the business. They were instrumental in hiring me and **made the transition seamless**. What stood out was how intentionally they stepped back, giving me full ownership while ensuring nothing was missed. finity gave me a fully scalable technology stack that allowed me to succeed.”

– **Chris Kim, Director of Finance**



Reach out to let us help you find
financial clarity for your business
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