

Built for Growth. Ready for Acquisition.



How finity evolved from financial planning into a finance + operations partnership supporting Permiso through growth and acquisition



PERMISO +
by  **okta**

finity 

Your Financial Clarity Partner.

PERMISO Growth Was Accelerating. Infrastructure Had to Catch Up.

When finity began working with Permiso, the company recently completed its Series A and was entering its next stage of growth

Unknown
Cash Runway

Disconnected
Reporting Frameworks

Manual Operating
Processes

Task

Build the Capability Behind the Growth.

Permiso needed automation and visibility across:



CASH
RUNWAY



HIRING



CAPITAL



BOOKING



PERFORMANCE



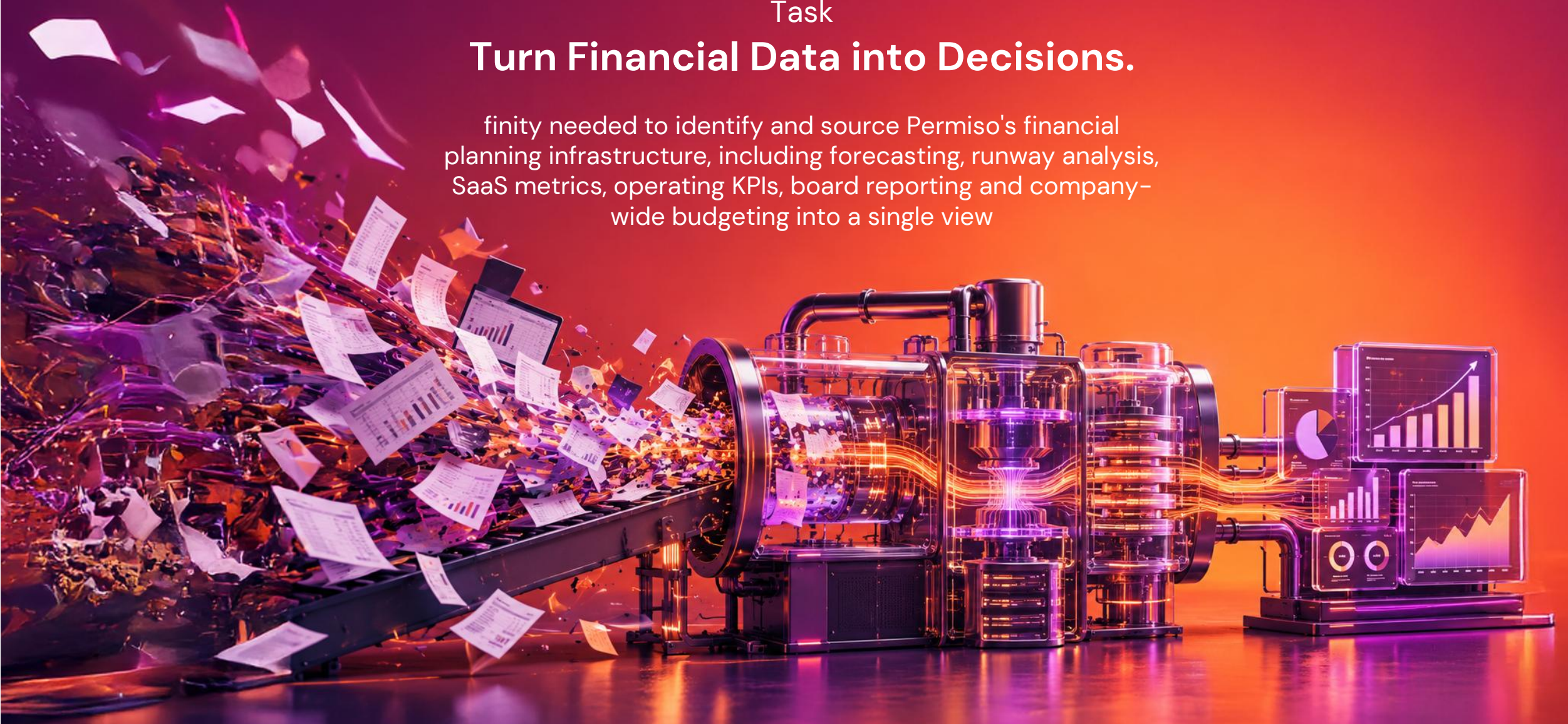
GROWTH

Better information. Better decisions. A finance function built to scale.

Task

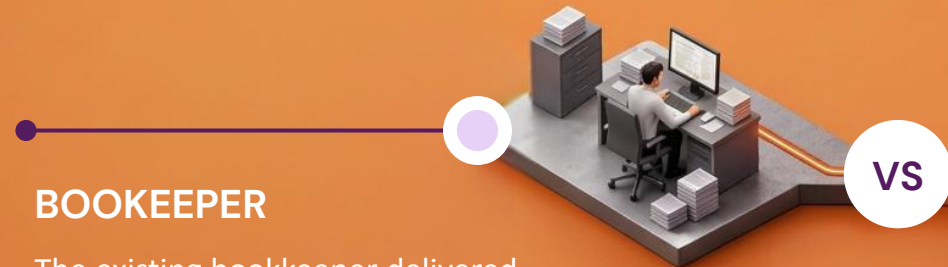
Turn Financial Data into Decisions.

finity needed to identify and source Permiso's financial planning infrastructure, including forecasting, runway analysis, SaaS metrics, operating KPIs, board reporting and company-wide budgeting into a single view



Action

One Partner. An Entire Finance + Operations Function.



VS

BOOKEEPER

The existing bookkeeper delivered delayed books riddled with mistakes and issues

FINITY

MORE CAPABILITY. LOWER COST.



All while correcting recurring accounting errors inherited from the bookkeeper

Results

Manual → Automated. Fragmented → Connected.

BEFORE

- Manual vendor management
- Manual invoice intake
- Manual billing + collections
- Fragmented reporting
- Accounting issues
- Disparate and expensive tech stack



AFTER

- Automated AP + AR
- Centralized reporting
- Structured budgeting
- Financial forecasting
- Board-level visibility
- Scalable HR + payroll

finity implemented a full tech stack that saved **hundreds of thousands of dollars** in annual savings and a successful acquisition

Results

A Smooth Operation Turned Into Acquisition Ready

For more than two years, finity streamlined Permiso's:

- Accounting
- Revenue Recognition
- Contracts
- Billing
- Payroll
- Tax
- Insurance
- Compliance
- Reporting
- Forecasting
- HR



+\$200k
Annual savings in
automating operations



+600
Diligence Tasks
Managed



~6 WEEKS
Initial Diligence to
Close

Streamlined operations allowed Permiso to **operate**. Then a strategic buyer emerged.
What helped Permiso run the company led to a smooth and successful exit.

Build the Back Office Around the Business.

finity centralized financial and operational reporting, automated management dashboards and transformed the processes supporting Permiso's day-to-day operations.



Leadership was able to spend its time building Permiso, not administering its back office.

Results

The Partnertship Went From Runway Planning to Acquisition

In August 2026, Permiso completed its strategic acquisition by Okta, culminating an approximately two-and-a-half-year engagement that had begun with a much simpler question:

How much runway do we have?

Because of finity's involvement, Permiso was able to successfully address over **600 diligence requests, negotiate its merger agreement, and successfully exit the business in six weeks.** These workstreams spanned accounting, revenue recognition, contracts, billing, tax, employment, HR, insurance, compliance, reporting and corporate and operational matters.

Because finity had spent more than two years working across these areas, the team could help Permiso identify documentation, reconcile financial information, explain historical decisions and coordinate the workstreams required to keep the transaction moving.



“finitly was instrumental in helping us scale our business and **successfully navigate our acquisition by Okta**. From building our financial infrastructure to managing a complex, fast-moving diligence process to navigating an incredibly complex acquisition. Tim and his team were **world class CFOs** and became an extension of our leadership. Simply put, **the best CFO partnerships we've ever had.**”

– Paul Nguyen, CEO Permiso



Reach out to let us help you find
financial clarity for your business
www.finitynow.com