finity

From Three-Month Close to a Successful Exit

How finity rebuilt a SaaS company's finance function and turned it into a growth and acquisition advantage

Your Financial Clarity Partner.

finity

OVERVIEW

The Climb at a Glance

From finance chaos to acquisition



Situation
3-4 month end close and no financial visibility

Task
Build a scalable finance function

Action
Rationalize, automate, build FP&A

Result
$400K annual savings and multiple expansion at exit

~$400K
Annual spending cut

+1.5x
Increase in ARR multiple

Acquired
Sold to a strategic buyer

SITUATION

At the Base of the Mountain: Fog, Chaos, No Map

3–4

MONTHS

for the Director of Finance to close the books

600+

accounts in the chart of accounts

1. **Unreliable financial statements**
   Deliverables took months and regularly had challenges and issues
2. **Fully manual, no visible reporting**
   Everything was done by hand, leaving leadership little real insight
3. **No planning or forecasting**
   There was no FP&A function behind the business
4. **Compliance was a non-starter**
   Processes were not built to meet compliance requirements or audit scrutiny

Copyright 2026. finity. All Rights Reserved.

TASK

Map the Route to a Finance Function Built to Scale



Enable insight and compliance

Deliver visible reporting and processes that are compliant and audit-prepared

Build FP&A

Stand up planning, budgeting and forecasting so the CEO can see ahead

Automate the manual

Use existing technology to remove manual work and speed up the close

Simplify the books

Rationalize the chart of accounts and bring accuracy to the financial statements

ACTION

Clean Up the Foundation

Rationalize, streamline, and automate before building anything new

01

Rationalize the chart of accounts

600+ accounts

↓

Rationalized chart of accounts

Departmental detail was embedded in the ERP, so the detail stayed while the business became easier to understand.

02

Streamline the accounting function

3-4 month close

↓

Streamlined accounting function

Reworked how accounting operates so the books could be closed faster and with fewer issues.

03

Automate the manual work

Manual tasks

↓

Automated with existing technology

Used the technology already in place to automate manual work away, rather than adding new tools.

Copyright 2026. finity. All Rights Reserved.

ACTION

Build a Full FP&A Function

With clean books in place, finity built planning and forecasting from scratch



Clean books

Rationalized accounts and a streamlined, automated accounting function

FP&A team

Delivered a complete internal FP&A function at a fraction of the cost

CEO visibility

Build out budgets, forecasts and forward-looking financial statements

Why it mattered

More insight, fewer inputs

Clean data meant analysis took far less effort

Performance became clear

Leadership could finally understand the business

Seasonality revealed

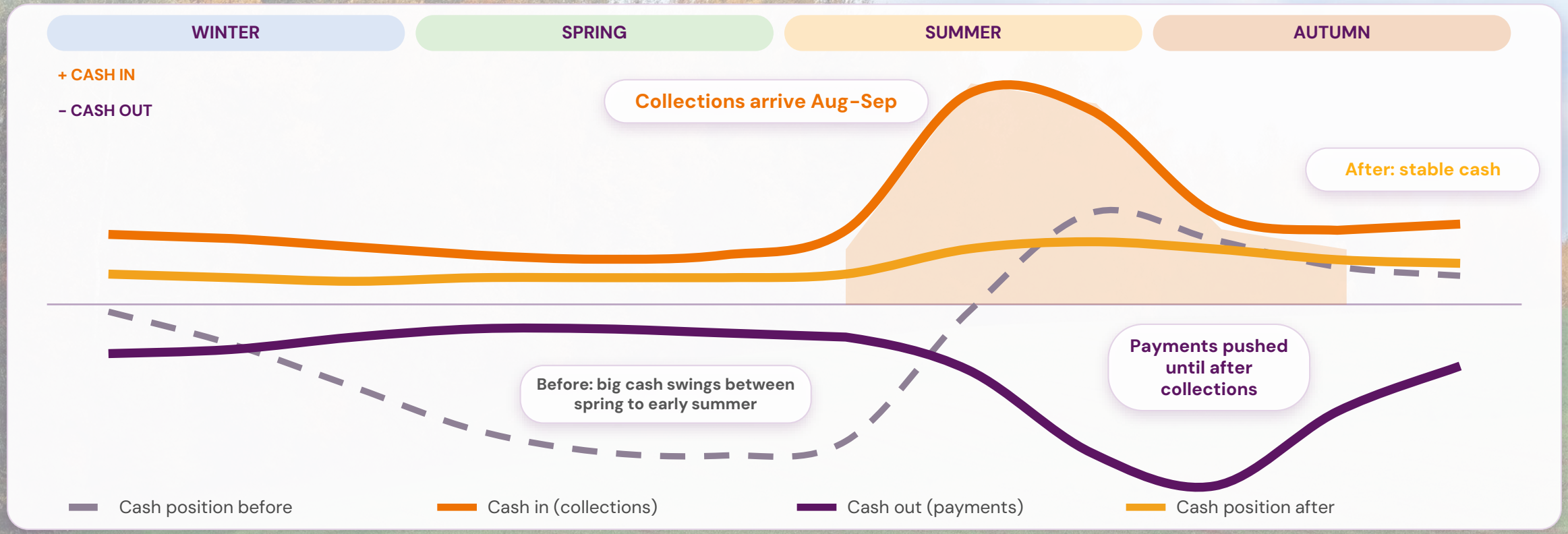
Patterns surfaced that were invisible before

Copyright 2026. finity. All Rights Reserved.

ACTION

Read the Seasons, Steer the Cash

Studied collections to reposition vendor payments, leading to a much more stable cash balance



1. **Seasonality revealed**
   Cash lowest in spring and early summer
2. **Collections cluster in Aug-Sep**
   DSO peaks in the seasonal summer
3. **Payments pushed out**
   Vendors negotiated to follow collections
4. **Cash in sync**
   Stable cash position, runway extended

Copyright 2026. finity. All Rights Reserved.

finity

RESULT

From Fog to Clear Sky

BEFORE finity

3–4 months

to close the books

- ✕ Statements with recurring issues
- ✕ Compliance a non-starter
- ✕ Manual, no visible reporting
- ✕ No FP&A, no forecasting
- ✕ Collections and payments out of step

WITH finity

In days

reporting, not months

- ✓ **Reliable, audit-prepared financials**
- ✓ **Compliant, automated processes**
- ✓ **Real-time reporting and dashboards**
- ✓ **Full FP&A team: budgets and forecasts**
- ✓ **Cash aligned, runway extended**

Copyright 2026. finity. All Rights Reserved.

finity

RESULT

Planting the Flag: The Financial Outcome

Better information led to better decisions - and measurable value



~$400K

in annual spending cut

Annual spending removed through a streamlined, automated finance function

+1.5x

increase in the ARR multiple

Clean, insight-rich financials helped drive a higher multiple at exit

Exit

successful acquisition

Sold to a strategic buyer at the end of the finity engagement

TAKEAWAY

Finance Built to Scale and to Sell

The foundation that helped the business run better became the foundation that helped it exit.

Clean books, real-time insight and forward-looking FP&A turned finance from a bottleneck into an advantage.

Clean books **Real-time insight** **Forward FP&A**



Copyright 2026. finity. All Rights Reserved.

finity

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

www.finitynow.com

Copyright 2026. finity. All Rights Reserved.