



## *Common Questions and Answers (Page 1)*

**Q1:** I get consultants contacting me all the time, how are you different?

**A:** The difference is, we aren't going to actively push our services, we only promote them. Our business growth model leverages word of mouth and networking. We want businesses to seek out our support as the best fit for their needs. Additionally, we aren't going to try to sell you a presentation for insane amounts of money. We work off a tiered hourly or fixed rate based on your needs. Our long term goal is to create a partnership and cadence of updates and meetings, maintaining a profitable and sustainable relationship.

**Q2:** What is a "fractional" role and how much does it cost?

**A:** A fractional role is a fancy industry term for part-time. Many see "Fractional CFO" and think they can't afford it, or think it is some big convoluted corporate solution. A Fractional CFO helps provide strategic financial guidance and leadership without the cost of hiring a full-time executive. Most small businesses need the guidance to keep them on the right path, not full-time day-to-day oversight and management. Your cost depends on the depth of your needs. It could be \$100's for simple guidance and feedback, or \$1,000's per month or year depending on the scope, depth and time commitment.

**Q3:** What is in scope and out of scope for your work?

**A:** Let's start with what we aren't – CPAs or Bookkeepers. We do work closely with them as required. We provide a cost-effective solution for businesses by bringing in a skill set that matches your needs. Our primary expertise is in streamlining processes and consolidating data to make it easy to interpret. You will see common templates we can quickly adapt to your business, leveraging data in your system to automate calculations and summaries. We help build an annual operating plan, track performance against business goals at a regular cadence, meet with business owners and/or teams to translate numbers into actions and provide foresight needed to flag risks in costs, cashflow, sales and other key areas.

Most importantly, we value integrity and honesty. If we are not a good fit for your business and won't be able to add value, we will make that perfectly clear. Our goal is to provide you with a return on your investment. Our expectation is to ensure payback is over 100%, ideally within the first quarter.



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**Q4:** Can you elaborate and give examples of how you will help on the finance and process side?

**A:** There are two big problems most small to medium sized businesses have in common. They have systems that do not talk to each other and incomplete data making insights nearly impossible. Most ERP systems like Sage, Quick Books, etc. have minimal data reporting and may not tie into separate job and invoice systems.

Our tools extract data from all sources, combine it into one file and calculate results. From this we can build individual performance files with 1 on 1 feedback for your sales team. We also build business tracking files for a quick snapshot of your business health compared to prior year, averages and your goals.

Once these Microsoft Excel tools are implemented, we build a plan for the next year and project your profits and cashflow. We leverage other tools to track this weekly so we can monitor progress. Tracking these metrics will help identify unexpected sales fluctuations; job cost and overhead variations; risks to cashflow and your ability for Accounts Payable to process your bills/payroll; keep Accounts Receivable in focus to maintain a healthy ratio vs. sales; minimize overdue payments falling through the cracks and more.

**Q5:** Do you offer any other services?

**A:** The short answer is, yes. We have seen so many opportunities in the small business space. You may be too large for home grown solutions, but too small for big industrial ones. Additionally, your needs may exceed the competencies of your team, and you may not even know where to start. We can help with sourcing options, making recommendations and even help implement solutions.

A good example of this is office networking. Many small businesses struggle with things as simple as proper Wi-Fi coverage in their office, but many businesses quote complex, costly solutions you don't have ownership or control over. We help many businesses with cost effective solutions and implementation.

We have also built estimating and tracking tools in Microsoft SharePoint with automated workflows.



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**Q6:** What is Microsoft SharePoint and how could that help me?

**A:** Microsoft SharePoint is a web-based Microsoft service that function as your team’s knowledge base and core. If you have a Microsoft business account, you may already have access to this and aren’t taking advantage of this feature. We have built estimating tools to track and extract more detailed job data, automating PDF email estimates and eliminating other subscription services. We have also built inventory tracking, equipment tracking, inventory logging, standard work libraries and other reporting/submission tools. It is a powerful program that is underutilized by many businesses.

**Q7:** What are some of your weaknesses?

**A:** An area we are actively trying to improve on is sales forecasting. This is not a focus area for us, but it is critical to the forecasting/planning portion of our work. We have leveraged business owners and historical data for most planning, but we are currently utilizing AI tools to analyze market trends and forecasts for your specific industry. We are also looking at the customer mix and analyzing their market trends. There may be cases where your field of work is thriving, but your customer’s is not.

**Q8:** How big is your team and what are their qualifications?

**A:** We are a single member LLC and leverage “as needed” help based on the demand. We have family, friends and colleagues with an interest in helping more. As a result, we are starting to connect with new customers. While we don’t have any official certifications, we have practical experience and success that can help fill a gap in your organization that won’t risk bankrupting you.

Michael Borkowski is the owner of the business and has a Bachelor of Science in Mechanical Engineering from UNC Charlotte. His leadership has built and developed world class teams, implementing their standard work globally. Finance has been a personal passion and was a growing responsibility, working closely with leadership in finance. His tools were held in high regard by peers and leaders, recognized by others outside of the organization that ultimately led to his career change.

