

Case Study: ~\$25M Vertical Business Management Software

Establishing financial capabilities post majority investment to set the stage for growth.

Situation

This was one of four interim CFO roles for new majority investments into technology businesses made by a private equity client. SoftwareCo was a high-growth vertical business management software. Peter was hired post-investment to stand-up the finance capabilities needed to support the investment thesis. He focused on building the readiness for the business to accelerate growth investments into go-to-market, customer acquisition, product expansions, and new talent hires.

Approach

- ▶ Acting as CFO for a period of ~12 months, Peter worked with investors, departing founders and existing management team to hit the ground running on first year investments.
- ▶ We worked daily with the management team, assessing capabilities, systems and processes to define the current state. We created a plan to attain the base level future state required to support first year goals.

Results

Stabilized core finance operations to improve margins, profits and revenue.

- ▶ Finance had been founder run with an administrative assistant using bank statements.
- ▶ First year audit completed within six months while cadence established for debt compliance and board reporting.
- ▶ Increased margins by reducing variable costs of SMS messages through contract negotiation with carriers and reducing waste in SMS volume sent.
- ▶ Increased top line revenue and margins by selecting and negotiating a new payment processing partner.

Finance led go to market improvements prepared business for accelerated growth.

- ▶ Segmenting renewals pipeline increased on-time renewals % and reduced churn. Funnel mapping led to identifying high potential leads increasing conversions.
- ▶ Our deep dives provided the blueprint for a new system stack consisting of NetSuite, Pardot, Sales Force and Zuora which increased team efficiency and productivity.

**We are looking for a
few great businesses to
improve stability,
predictability and
profitability.**

Ready to Start a Conversation?



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Function and Specialization

Peter O'Brien is the owner of Digital Finance, LLC, living in Charleston, SC. Peter is a seasoned CFO advisor with over 20 years of experience in private equity and VC backed technology and software companies.

He has a proven track record in complex situations, diligence, operating model design, system implementations, and post-acquisition integration.

Peter has consistently led and transformed finance functions, driving significant growth and scalability in various organizations.

Education

B.S. from Marquette University
CPA from State of California