

tatum provides interim financial leadership for a post-acquisition transformation.



at a glance

- A national private equity firm was preparing for an acquisition and needed an interim CFO to address financial process gaps post-acquisition.
- Tatum placed an interim CFO pre-close to prepare for post-close activities and added an interim Controller to support financial reporting and compliance.
- Established a strong financial foundation, including debt reporting and GAAP conversion, and ensured a smooth transition to permanent hires.

challenge

A prominent private equity firm managing \$4 billion across 30 active portfolio companies was preparing for a significant acquisition. The target company lacked a CFO and essential financial functions, presenting a complex challenge. Having previously worked with Tatum and knowing our reputation of providing proven financial leadership, Tatum was engaged to provide an interim CFO who could:

- Prepare for the transition and build a post-acquisition financial strategy.
- Establish financial processes and reporting that align with new private equity ownership standards.
- Navigate the delicate dynamics of a family-owned business without implementing a complete overhaul.
- Build effective processes and procedures to support growth.
- Position the company for a sustainable future while addressing urgent financial needs.



tatum
by randstad.

solution

Tatum addressed the project needs with a strategic and thoughtful approach. We prioritized understanding the client's needs and developed a comprehensive plan to ensure a successful acquisition transition, which was essential in addressing the immediate financial challenges. Key steps included:

- Conducting a thorough review of existing financial processes to identify critical gaps that needed immediate attention.
- Utilizing our extensive network of tested and proven executives, we quickly secured a proven and qualified CFO who could deliver results in just 6 months by conducting financial evaluations, performing due diligence, and laying the groundwork for a successful acquisition. This included adding an interim Controller to support executing the post-acquisition strategy.
- Implementing strong financial reporting practices and compliance measures to align with private equity standards, ensuring a foundation for future growth.

outcome

Tatum's proactive involvement was vital in stabilizing the acquired company during its transition to private equity ownership. Leveraging our extensive experience and deep understanding of the post-acquisition needs of PE-held companies, we addressed immediate financial challenges and laid the groundwork for sustainable growth. Our expertise helped:

- Establish necessary finance and accounting functions for post-acquisition stability and growth.
- Fill essential roles until permanent hires were in place, ensuring a smooth transition and seamless financial oversight.
- Accelerate the transformation into a PE-owned entity, establishing robust processes for ongoing financial management.

As a national firm and trusted partner, Tatum leverages its deep relationships and highly specialized talent to deliver exceptional financial leadership tailored to your needs. [Contact us today](#) to discover how Tatum can help your business thrive in today's competitive landscape.

