

# Rebuilding a family business's finance function — strategy and execution, side by side

## Topics

Financial Accounting & Performance Improvement  
Fractional & Interim Finance  
Fractional & Interim HR  
Fractional & Interim Strategy & Execution  
Human Resources Mgmt & Solutions

## Industry

Technology, Media,  
Telecommunications  
& Software

## Team Size

3 members: Decision  
Intelligence & AI  
Lead, FP&A Manager  
/ Sr. Analyst

## Duration

1 year and ongoing —  
weekly cadence

## Situation

A third-generation, family-owned vehicle upfitter engaged Growth Operators following a divestiture that left its finance function understaffed and in transition. With both strategic planning and day-to-day execution needs unmet, the organization required immediate tactical support alongside longer-term financial direction. Growth Operators stepped in to provide both, stabilizing operations while helping define future priorities.

## Execution

During our engagement, the Growth Operators team:

- Conducted a nextLEVEL<sup>®</sup> assessment of finance and accounting,
- Cleared eight months of overdue financials and brought sales tax filings current across 13+ states.
- Designed and implemented scalable monthly financial reporting to improve visibility and decision-making.
- Led day-to-day accounting operations and lease accounting compliance.
- Strengthened the finance organization by defining the talent strategy, hiring a new finance leader, and updating SOPs and team structure for scalability.

## Result

The client cleared a multi-month financial backlog in three months, restoring reporting accuracy and compliance across multiple states while stabilizing the finance function. With a new finance leader in place and a scalable organizational design, the company established reliable, executive-ready monthly reporting to support future growth.