



STRONGER FINANCE AND OPERATIONS THROUGH DATA STRATEGY AND AUTOMATION.

For SMBs and PE-backed companies, faster close, cleaner reporting, clearer margins, without ripping out the tools you already use.

WHO THIS IS FOR

PE OPERATING PARTNERS

REPORTING THAT REPLICATES ACROSS THE PORTFOLIO

Multi-entity consolidation, quarterly board prep, and infrastructure built to scale across add-ons.

CFOS & COOS

THE SYSTEMS A FINANCE LEADER CAN OPERATE FROM

Close acceleration, automated reconciliation, GL cleanup, unit economics; complementary to finance leaders.

OWNERS & OPERATORS

VISIBILITY AT THE INFLECTION POINT

Margin clarity, automation that frees the team, and decision support when the business is moving faster than the books.

SERVICES

01

DATA ENGINEERING

The foundation everything else is built on.

System integrations · ETL pipelines · Data warehouses · Legacy ERP extraction · Single source of truth

02

FINANCIAL OPERATIONS

Finance, faster and cleaner.

Close automation · Multi-entity consolidation · Unit economics · Investor-grade reporting

03

BUSINESS ANALYTICS

Visibility into what's actually driving your business.

Executive dashboards · ROAS tracking · Margin by job · Cohort & retention analysis

04

PROCESS AUTOMATION

Manual work that runs itself.

Auto-reporting · RPA workflows · Exception alerts · Reconciliation engines

05

DECISION SUPPORT

Turning data into a clear picture of what to do next.

KPI architecture · Scenario modeling · Driver-based forecasting · Board packages

WHAT CHANGES, OUTCOMES FROM RECENT ENGAGEMENTS

WHOLESALE DISTRIBUTION

\$4.1M

REVENUE SURFACED

Opportunities identified across a \$65M product portfolio.

CONSUMER GOODS

3 → 1

SYSTEMS CONSOLIDATED

Adagio, Sage 50, and QBO unified into one investor-grade reporting package with QoE reconciliation.

INDUSTRIAL MANUFACTURING

7%

MARGIN LIFT VALIDATED

Bottom-line improvement confirmed through job-level labor visibility.

SYSTEMS WE WORK IN

ACCOUNTING & ERP

QuickBooks · NetSuite · Sage Intacct · Dynamics 365 Business Central · Xero

BI & REPORTING

Power BI · Excel · Google Sheets

DATA & WAREHOUSING

Snowflake · Microsoft Fabric · BigQuery · Python · SQL

AUTOMATION

Power Automate · API integrations

CRM, MARKETING & PAYMENTS

HubSpot · custom CRMs · Google Ads · Microsoft Ads · Meta Ads · Stripe · Shopify

CLOUD & COLLABORATION

SharePoint · Google Drive

HOW TO START

ONGOING RETAINER

Monthly. Recurring work, sustained presence.

DEFINED SCOPE PROJECT

Bounded engagement with a clear output.

UNDER 10 HRS HOURLY

Diagnostic reviews, targeted fixes.