

3P Finance Roadmap

People · Platform · Process — from Chad Anselmo's *Equipping Your Finance Department for Growth*. Revenue tiers are proxies; use headcount or backlog if that fits better. **Bold** = tip-of-the-spear focus at that stage.

Company: _____

Revenue / proxy: _____

Stage (circle): Under \$25M · \$25M · \$50M · \$100M+

STEP 1

Check People, Platform, and Process at your current stage.

STEP 2

Circle bold items you have not built yet.

STEP 3

Plan next ceiling using boxes on page 2.

PEOPLE DEBT Understaffed, burnt out, or wrong hires — babysitting vs. leading.

PLATFORM DEBT Fighting your own tech instead of competing with it.

PROCESS DEBT Every decision through one person — single point of failure.

STAGE	P	CHECKLIST — CHECK WHEN IN PLACE
Under \$25M <i>Spear: cash flow + profit</i>	People	<input type="checkbox"/> Bookkeeper <input type="checkbox"/> Tax (ext.) <input type="checkbox"/> Payroll specialist
	Platform	<input type="checkbox"/> Accounting (simple) <input type="checkbox"/> Payroll <input type="checkbox"/> PEO (maybe) <input type="checkbox"/> Office suite
	Process	<input type="checkbox"/> Annual close <input type="checkbox"/> Weekly bank statement <input type="checkbox"/> Monthly billing
\$25M <i>Spear: right projects</i>	People	<input type="checkbox"/> Controller <input type="checkbox"/> AP/AR clerk + bookkeeper, payroll specialist, tax
	Platform	<input type="checkbox"/> ERP (2nd tier) <input type="checkbox"/> Estimating <input type="checkbox"/> Time tracking <input type="checkbox"/> Payroll <input type="checkbox"/> Banking partner
	Process	<input type="checkbox"/> Quarterly closes <input type="checkbox"/> Monthly AR/AP <input type="checkbox"/> Job profit before finish <input type="checkbox"/> Ad-hoc monthly reporting <input type="checkbox"/> Annual review
\$50M <i>Spear: hire grippers</i>	People	Stack through controller + <input type="checkbox"/> CFO · finance mgr · FA · HR mgr · IT mgr
	Platform	ERP · estimating · time · payroll · safety · CRM · fleet · expense · <input type="checkbox"/> Banking platform
	Process	<input type="checkbox"/> Annual budget <input type="checkbox"/> Monthly job profit <input type="checkbox"/> Monthly close <input type="checkbox"/> Weekly AR/AP <input type="checkbox"/> Annual audit
\$100M+ <i>Spear: what → why</i>	People	<input type="checkbox"/> Data / BI function (director of finance or BI lead) + analytics team
	Platform	<input type="checkbox"/> Data warehouse / mart (Power BI or equivalent) for trend reporting
	Process	<input type="checkbox"/> Monthly reporting package for senior mgmt · 5 forward-looking metrics reviewed monthly

Under \$25M → \$25M: Controller · job profit before finish · payroll + time tracking

\$25M → \$50M: CFO · monthly close · banking partner (set up credit before you need it)

\$50M → \$100M: Data gathering hire · robust reporting package · data warehouse

\$100M+ leadership: Trust but verify · hire slow, fire fast · patience — let decisions simmer

