



BILLD CFO WEBINAR SERIES · JUNE 24 · 12 PM CT

Equipping Your Finance Department for Growth

The people, process, and platform roadmap for profitable growth

You'll walk away with...

- **What you need** at each stage
- **Where to focus:** the tip of the spear
- **What's next** before the next ceiling

Under \$25M · \$25M · \$50M · \$100M+



Chad Anselmo

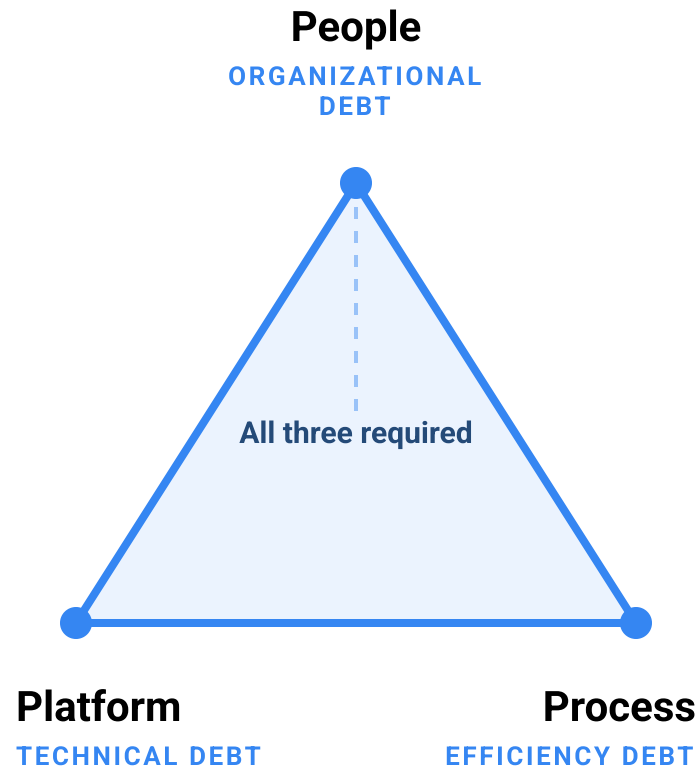
Managing Partner, Lionshield Holdings

10-time CFO | Owns and operates 5 commercial subcontracting businesses

- Spearheaded Corvia's nine-figure exit as CFO / CEO
- Assisted Paysafe's \$4.6B acquisition as CFO of their Payment Division
- Led teams up to 350 employees

The 3P Framework

Invest across all three for profitable growth. Cut corners and you create debt.



People

Platform

Process

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STAGE 1

Under \$25M

Setting the stage

OWNER FEELS

Overwhelmed, ready
to delegate

FINANCE FEELS

Fragmented, just
covering payroll

TIP OF THE SPEAR

Cash flow + profitability

Everything you need

PEOPLE

- Bookkeeper
- Tax (External)
- Payroll Specialist

PLATFORMS

- Accounting (Simple)
- Payroll (built in)
- PEO (Maybe Built In)
- Microsoft Office / Google

PROCESS

- Annual Close
- Weekly Bank Statement
- Monthly Billing

Where to focus

PEOPLE

- Bookkeeper
- Tax (External)
- Payroll Specialist**

PLATFORMS

- Accounting (Simple)
- Payroll (built in)**
- PEO (Maybe Built In)
- Microsoft Office / Google

PROCESS

- Annual Close
- Weekly Bank Statement**
- Monthly Billing

What to anticipate

Before the next ceiling (\$25M), start preparing for:

NEXT HIRE

Controller

NEXT PROCESS

**Job profit before
project finish**

NEXT PLATFORM

Payroll + time tracking

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STAGE 2

\$25M

Setting the stage

OWNER FEELS

Lack of visibility, hesitant to invest

FINANCE FEELS

Overwhelmed, time to hire

TIP OF THE SPEAR

Getting more of the right projects

Everything you need

PEOPLE

- Bookkeeper
- Tax (External)
- Payroll Specialist
- AP/AR Clerk
- Controller

PLATFORMS

- Accounting (Simple)
- Payroll (built in)
- PEO (Maybe Built In)
- Microsoft Office / Google
- ERP (2nd Tier)
- Estimating
- Time Tracking
- Payroll
- Banking partner / platform

PROCESS

- Annual Close
- Weekly Bank Statement
- Monthly Billing
- Quarterly Closes
- Monthly AR/AP
- Job Profit Before Project Finish
- Annual Over/Under Billings
- Ad-hoc Monthly Reporting
- Annual Review

Where to focus

PEOPLE

- Bookkeeper
- Tax (External)
- Payroll Specialist
- AP/AR Clerk**
- Controller**

PLATFORMS

- Accounting (Simple)
- Payroll (built in)
- PEO (Maybe Built In)
- Microsoft Office / Google
- ERP (2nd Tier)**
- Estimating**
- Time Tracking**
- Payroll**
- Banking partner / platform

PROCESS

- Annual Close
- Weekly Bank Statement
- Monthly Billing
- Quarterly Closes**
- Monthly AR/AP**
- Job Profit Before Project Finish**
- Annual Over/Under Billings
- Ad-hoc Monthly Reporting**
- Annual Review**

What to anticipate

Before the next ceiling (\$50M), start preparing for:

NEXT HIRE

CFO

NEXT PROCESS

Monthly close

NEXT PLATFORM

Banking partner / platform

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STAGE 3

\$50M

Setting the stage

OWNER FEELS

Flying by the seat of their pants, visibility gone

FINANCE FEELS

Hanging onto a rocketship with your bare nails

TIP OF THE SPEAR

Hire people to grip for you

Everything you need

PEOPLE

- Bookkeeper
- Tax (External)
- Payroll Specialist
- AP/AR Clerk
- Controller
- IT Manager
- Financial Analyst
- Finance Manager
- HR Manager
- CFO

PLATFORMS

- Accounting (Simple)
- Payroll (built in)
- PEO (Maybe Built In)
- Microsoft Office / Google
- ERP (2nd Tier)
- Estimating
- Time Tracking
- Payroll
- Safety
- CRM
- Fleet Management
- Expense System
- Banking Platform

Everything you need: Process

- Annual Close
- Weekly Bank Statement
- Monthly Billing
- Quarterly Closes
- Monthly AR/AP
- Job Profit at Project Finish
- Annual Over/Under Billings
- Ad-hoc Monthly Reporting
- Annual Review
- Annual Budget
- Monthly Job Profit
- Monthly Closing
- Weekly AR/AP (Cash Flow)
- Quarterly Over/Under
- Semi-Annual CTC
- Monthly Acct Reconciliation
- Minimal Monthly Reporting
- Annual Audit

Where to focus

PEOPLE

- Bookkeeper
- Tax (External)
- Payroll Specialist
- AP/AR Clerk
- Controller
- IT Manager
- Financial Analyst
- Finance Manager
- HR Manager
- CFO**

PLATFORMS

- Accounting (Simple)
- Payroll (built in)
- PEO (Maybe Built In)
- Microsoft Office / Google
- ERP (2nd Tier)
- Estimating
- Time Tracking
- Payroll
- Safety
- CRM
- Fleet Management
- Expense System
- Banking Platform**

Where to focus: Process

- Annual Close
- Weekly Bank Statement
- Monthly Billing
- Quarterly Closes
- Monthly AR/AP**
- Job Profit at Project Finish
- Annual Over/Under Billings
- Ad-hoc Monthly Reporting
- Annual Review
- Annual Budget**
- Monthly Job Profit**
- Monthly Closing**
- Weekly AR/AP (Cash Flow)**
- Quarterly Over/Under
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- Minimal Monthly Reporting
- Annual Audit

What to anticipate

Before the next ceiling (\$100M), start preparing for:

NEXT HIRE

Data gathering

NEXT PROCESS

Robust reporting package

NEXT PLATFORM

Data warehouse

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STAGE 4

\$100M+

The road to \$100M+: 3 stories

- The shift from "What?" to "Why?"
- Eating raw red beans and rice
- A lesson on people leadership

Submit questions for Chad in the chat



Chad Anselmo

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Scan to schedule a call with our team

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