

THE ROAD TO \$100M+

# \$50M+ Finance Playbook

Shift from what happened to why it happened — data, reporting, and the leadership lessons that keep growth profitable.

At \$100M+, the three Ps are in place. Work shifts from systems to leadership — from *what* to *why*. The controller you hired at \$25M is now the backbone of every forward-looking decision. Bad data at this stage is a hard slog.

- The shift from "What?" to "Why?"
- Red beans and rice — patience while decisions simmer
- People leadership: trust, pace, and grace

Next investments at \$100M+

## People

### Data gathering

Director of finance or BI lead — a full analytics function

## Process

### Reporting package

Monthly package senior management uses to steer the ship

## Platform

### Data warehouse

Power BI, data mart, or equivalent for trend analysis

# Data, patience, and people

## From "what" to "why"

Junior finance leaders download the bank ledger when cash is tight. Senior leaders go to the PM: *Why* are we over on material? Rain contamination, theft, wrong order, delivery timing – those are the decisions that change future margin. Introduce five forward-looking metrics early and review them monthly. Data removes emotion and creates a foundation for A/B-style testing across the business.

## Red beans and rice

Chad's mentor repeated this phrase until Chad realized it was not about Taco Bell – it was about patience. No one wants raw red beans and rice. Organizations at \$100M want to move constantly. Season decisions. Careers have seasons too.

1

### Trust but verify

High-trust organizations still need controls. At \$50M you are already trusting departments at scale.

2

### Hire slow, fire fast

Good talent finds you when you take time. C players cost more than you think – move quickly when fit is wrong.

3

### Nobody is perfect

Finance is asked to be 100% accurate every day. Build culture that allows learning – get the team out of the office sometimes.

**Interview discipline (from Q&A):** You should know in three to five minutes if you can work with someone for three to five years. After the hiring manager screen, run six short stakeholder interviews (10–15 minutes) on culture and fit. Peers often surface what technical interviews miss.

**Controller → CFO path:** Few controllers make the jump without strategic curiosity. Identify the three to five levers that drive profit in your organization. If reconciliations matter more than growth, recalibrate before pursuing the CFO title.

**Find mentors:** CFMA events, Procore and payroll vendor conferences, and industry web boards are full of finance leaders solving the same problems. Most will share what they learned the hard way.