

GROWTH AND OPERATIONS EXPERTS - Sample Profiles



Unique ID	694191184	697895864	70205297
Firm Location (City)	Methuen	Portsmouth	Boston
Firm Location (State)	MA	NH	MA
Firm Location (Zip)			
Your firm's geographic range (where you will accept clients from)	Nationally, we market in my 2 territories Merrimack Valley, MA and Southern Maine, but accept referrals where ever they may be.	Central and southern NH, southern ME (as far north as Portland), and eastern MA (Boston and north)	Across USA
General description of your firm's offerings	<p>We provide outsourced bookkeeping and controller services. We provide monthly financial statements to our clients, doing as much or as little of the transactional work as required. We offer all the traditional services, AP, AR, Collections, Reconcile Balance Sheet, Help establish budgets / forecasts. etc.</p> <p>With years of experience working for operating companies for Private Equity Companies, I've had significant experience working on both the buy and sell side of the due diligence process.</p>	<p>I partner with businesses and their leaders to improve sales, profitability performance, financial stability, sustainability, and other critical operational issues. I have advised business leaders in overcoming serious business challenges and in bringing businesses to scale for acquisition. He has worked with businesses involved in professional and B2B services, private equity investing, manufacturing, hospitality, property management, IT/cybersecurity, and SaaS.</p>	<p>I provide business owners the outside perspective they need to manage change and accomplish their business goals. I accomplish this through assessments, training and coaching.</p>
Specific services or niches your firm specializes in	We customize our scope of work around client needs, always starting with the financial statements. Generally we set-up key performance indicators and track performance against them.	<p>Strategic vision development and planning Action planning to execute on strategic objectives Aligning operations with strategic objectives Preparing for and managing the effects of growth Refining and redesigning work flows and processes to improve efficiency and value delivery to customers Aligning human capital management systems and processes with strategic and operational objectives Coaching and developing executives and managers Leading/supporting acquisition due diligence and deal structuring</p> <p>Considerable experience in B2B and professional services companies.</p>	<p>My firm specializes in supporting business owners to focus on untapped potential (theirs, their team's or their company's) so they can accomplish their goals quicker and with greater success than they would otherwise.</p> <p>My client's tell me the greatest benefit they receive from working with me is clarity, ensuring they are pointed in the right direction to make the right changes, in the right order. Clarity reduces their uncertainty, frustration and stress.</p>
How your firm gets paid (Hourly, Modular, Commission, % of Sale Price, etc.)	We charge our clients a bi-weekly fixed fee based on scope of work, or an hourly rate when scope isn't well defined.	<p>Hourly for consulting services % of sales price on successful completion of an exit transaction</p>	I get paid monthly. There is no "locked-in" contract on either side, but I do ask for a minimum of a 3-month commitment.
Do you do free initial consultations? 30 mins, 60 mins?	Happy to do an initial 60 minute free consultation.	A free initial two-hour consultation is offered to learn about your situation and to allow both of us to evaluate the quality of personal fit.	Yes
Number of employees in your firm	We are part of a national franchise, my location has 12 accountants on staff.	1	1
What makes your firm unique?	We hire experienced accountants and controllers who work part time out of their homes, have processes and procedures to all us to efficiently work on our clients behalf. Our unique model brings cost effective accounting expertise as well as business acumen to helping our clients meet their goals and objectives.	Many years of direct leadership experience in a firm that I founded and ran for 15+ years, interim and direct leadership of several other firms, successful ESOP and internal and external sale transactions for several firms.	<p>Unlike many business coaches, I have 25+ years of business management experience.</p> <p>I truly put my clients needs first. My role is in supporting my clients to manage change and accomplish their business goals, whatever those might be.</p> <p>As a FocalPoint Certified Business Coach, I have a toolbox at my disposal that has been developed over 20 years and used with thousands of business clients.</p>
Minimum Client size (# of Employees / Revenue / EBITDA etc.)	<p>Clients are typically in the \$1M - \$25M range with from 1 to 100 employees.</p> <p>Clients range from pre-revenue startups to companies preparing for exit.</p>	25+ employees, revenue of \$5 million+	10 employees
Industries Services (All or Specific)	All. We support clients across many different industries; manufacturing / distribution, general contractors, trade industries, professional service companies, architects, retail, event industry and many more.	All	No retail, manufacturing or hospitality
Other criteria in choosing your prospects	Always screening to make sure there's a good fit with or value add vs. clients needs / budgets.		
Number of years experience in your field	5	11+	25
Industry Designations (CFP, CLA, CPA etc.)			Certified Executive & Business Coach
Best times to contact you			
Preferred Communication Methods	In Person, Phone, Email, Zoom / Skype etc.	Phone	Email
Elevator Pitch / Anything prospective clients should know about you?	We provide outsourced bookkeeping and controller services to clients across a wide range of industries. We typically work with clients whose businesses are growing in complexity and are looking for support in navigating these challenges.	I work with business leaders to solve the operating and growth issues that keep them awake at 3:00 AM, helping them to increase value for their customers and themselves and positioning them for successful exits.	
	We love helping grow their profitability and enterprise value.		