

Build Your Finance Org Chart

As a company grows, it needs to invest in more specialized talent in finance and throughout the organization. Although every company is different, there are clear best practices for how successful growth companies hire. The scope of roles and sequencing will vary based on your industry, risk, complexity and future goals as a company.

The following deck represent a common growth approach to organizational planning, modelled on other fast-growing SaaS/Tech companies. Each slide represents a stage of growth by company revenue, and presents a finance hiring strategy and structure.

Each department is grouped by function

Reporting & Transactions

Management Reporting • VC/PE/Public • Tax • Compliance • Payroll/Transactions

Financial Planning & Analysis

Budgeting • Forecasting • Cash Flow • Analysis

Growth Projects

Systems Planning/Implementation • IPO • Series A/B • M&A

WAYS TO USE THIS RESOURCE:

1

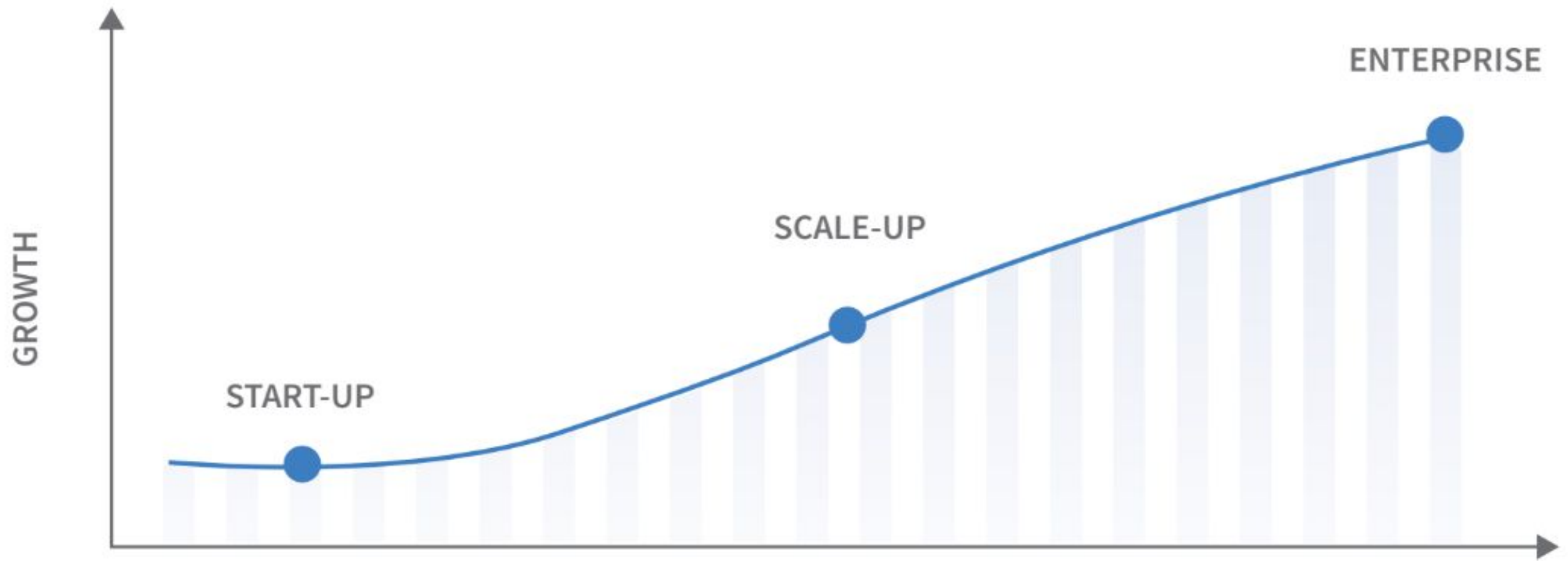
Understand where you are now and your growth trajectory.

2

Plan your hiring pipeline.

3

Copy a chart and fill in your team and open headcount.



As you grow, your needs change.

We've helped hundreds of companies build their finance teams. The following charts illustrates how many scale-ups structure their teams.

Key Finance Objectives

- Raising capital
- Cash flow management

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- Cash flow management
- KPI Development
- Developing controls

- Capital Optimization, planning, IPO and shareholder development

- Protect & grow shareholder value

Time Spent

- Tracking for growth
- A/P and A/R
- Building structure and tools

- Growing team & reporting capabilities
- Budgeting & forecasting
- Modeling scenario analysis

- Building structures & tools for new customer segments
- Monitor & progress improvements that drive performance

- Maintain relationships with external shareholders (directors, investors, lenders, bankers, analysts, peers)

Skills Required

- Perseverance & hustle
- Comfort in ambiguity
- Managing vendor for outsourcing

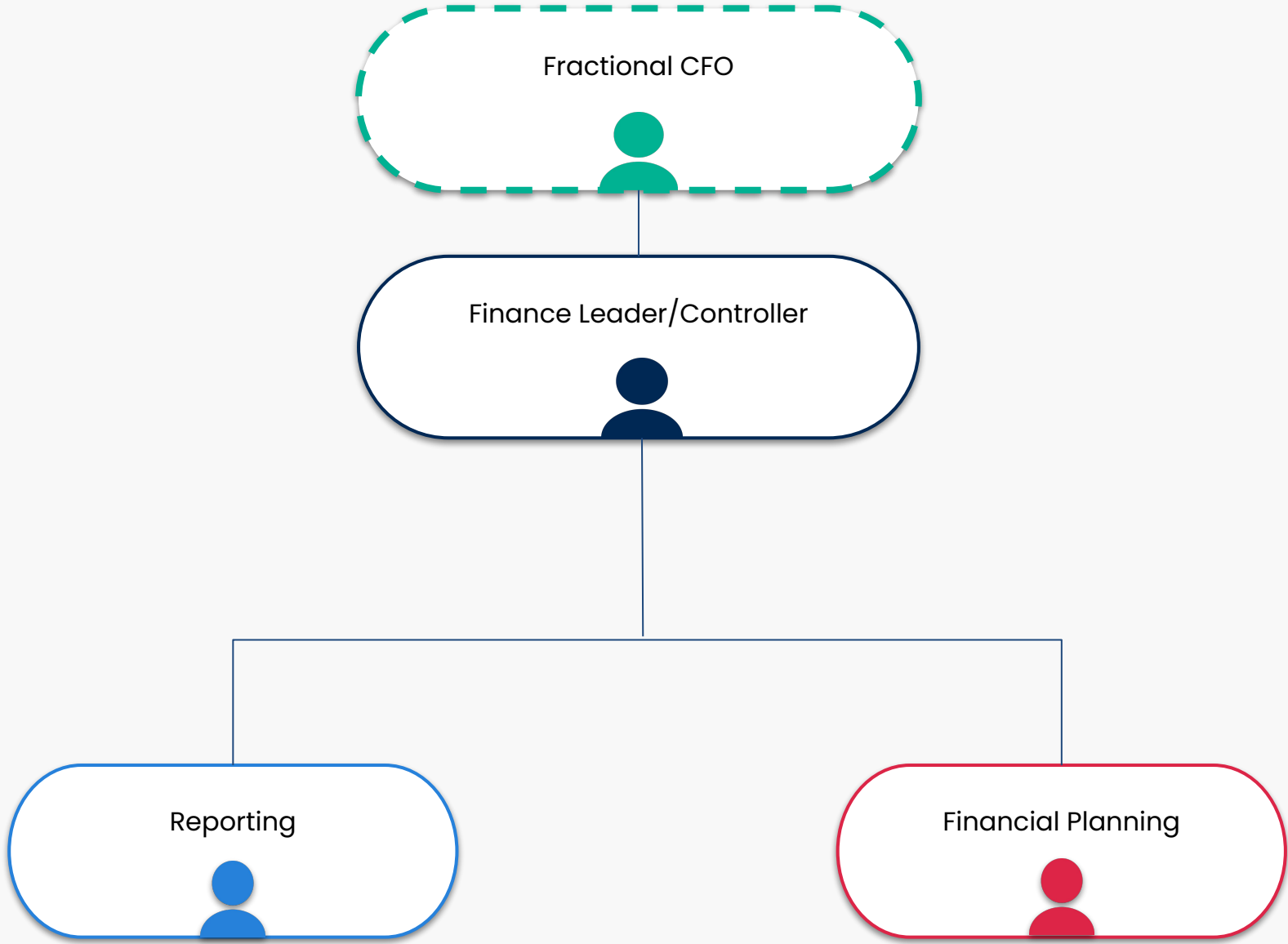
- Domain knowledge (SaaS metrics)
- FP&A
- Controls

- Business leadership
- Governance and controls

- Strong business acumen
- Focus
- Varied experience

- Senior Leadership
- Reporting & Transactions
- Financial Planning & Analysis
- Growth Projects
- Full-time
- Contract

<\$10M



Many organizations of this size bring in a **fractional/interim CFO** to act as a guide the finance leader and help them navigate challenges and opportunities. Their role is to assess people, processes and systems and maintain focus on growth.

Systems roadmapping involves looking at your growth plans and ensuring that the finance system, processes and teams are built in alignment with the business plans.

It is important to get ahead of where the business is going and build a foundation that can help you scale as you grow.

At this stage, all foundational functions of a finance department are still required but are often carried out by fewer resources.

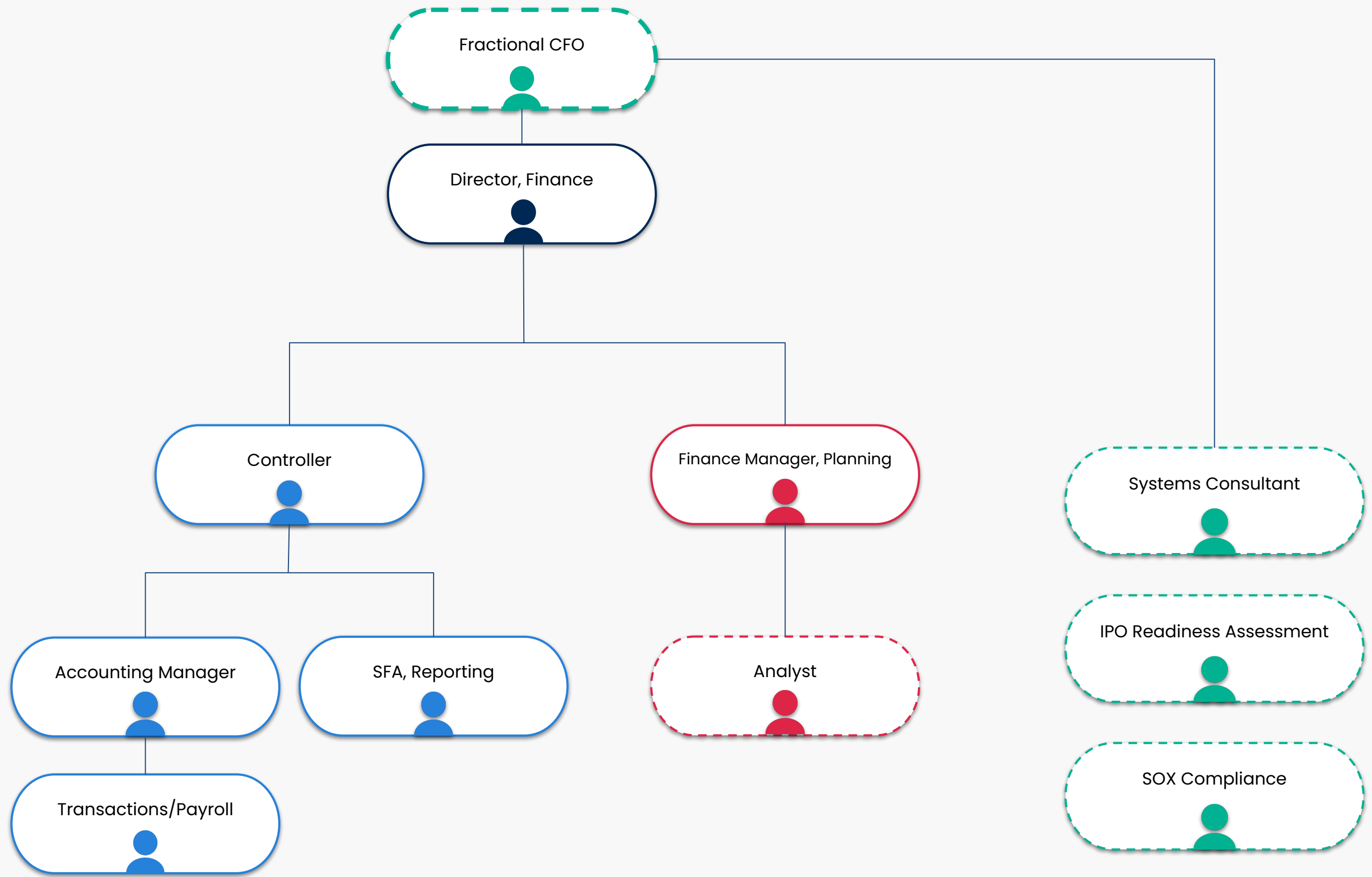
This means that you may only have one resource in your reporting and financial planning departments, but all basic finance functions are being spread amongst the team.

Systems Roadmap



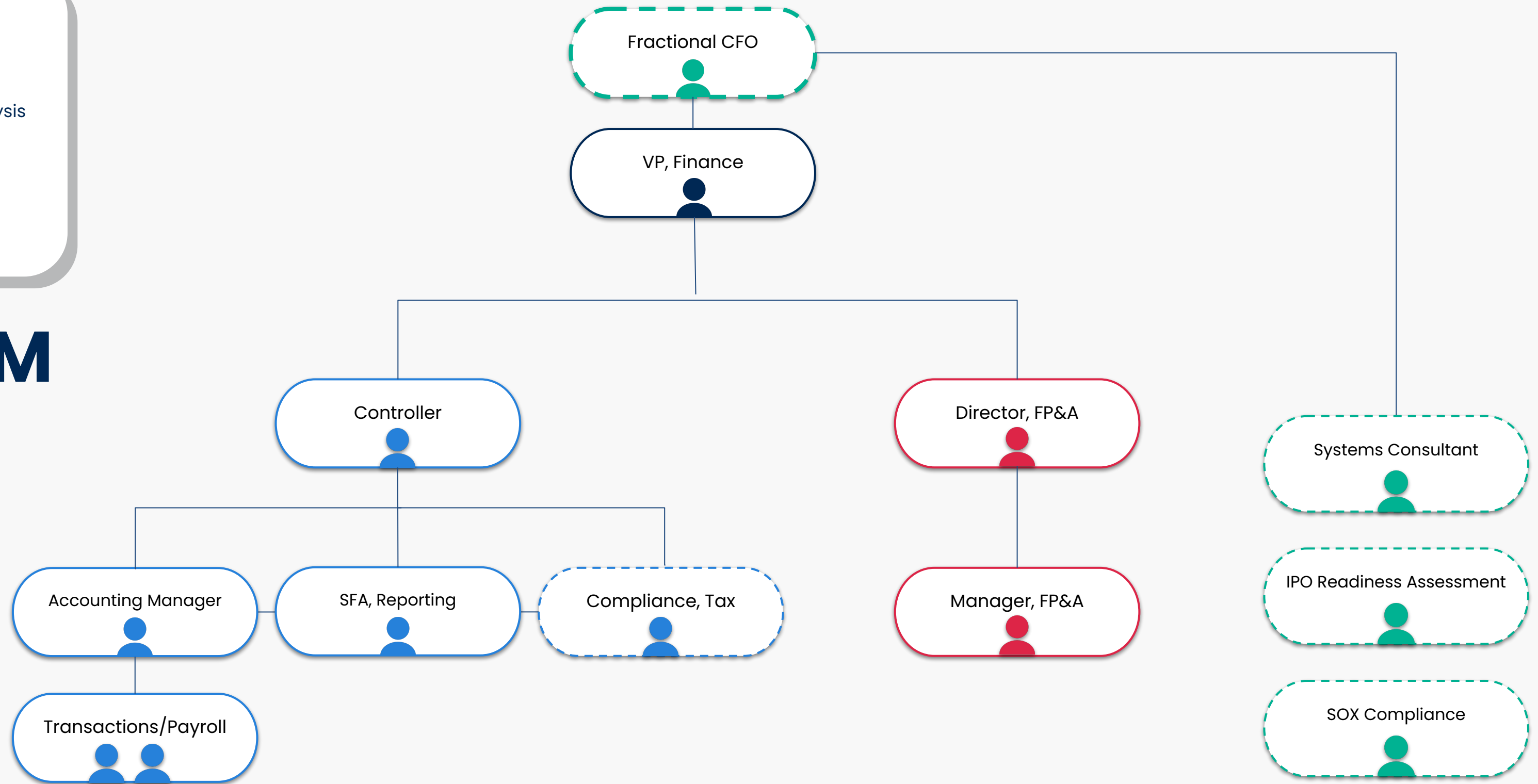
- Senior Leadership
- Reporting & Transactions
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- Growth Projects
- Full-time
- - - Contract

\$10-50M



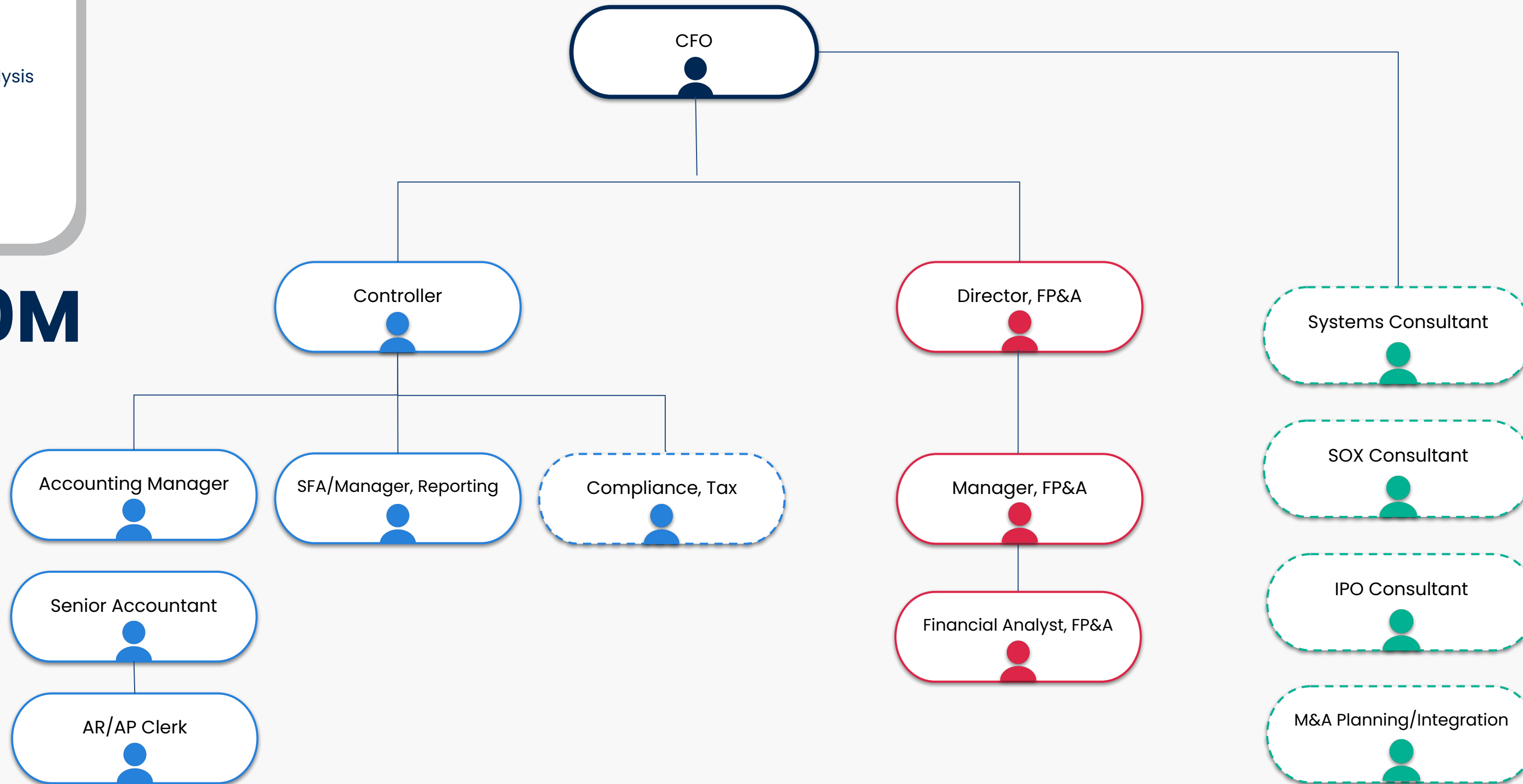


\$50-100M



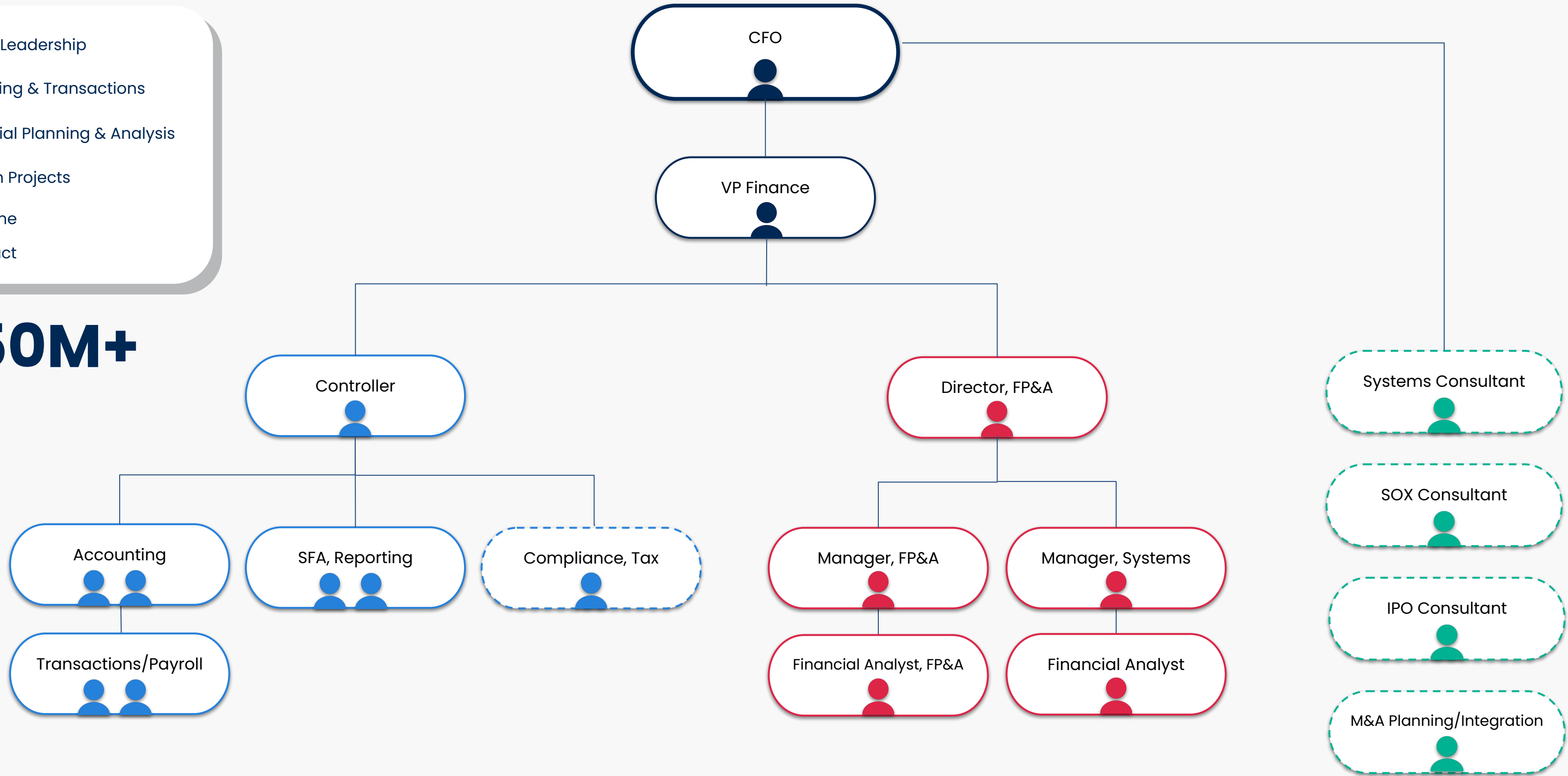
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- - - Contract

\$100-250M





\$250M+



Hire Smarter and Faster



We help high-growth companies build strong finance teams that are built to scale. Here's why we're different:

DATA DRIVEN RECRUITMENT

We help build high performing finance teams. Our proprietary technology is designed to reduce bias and help you find talent that will thrive.

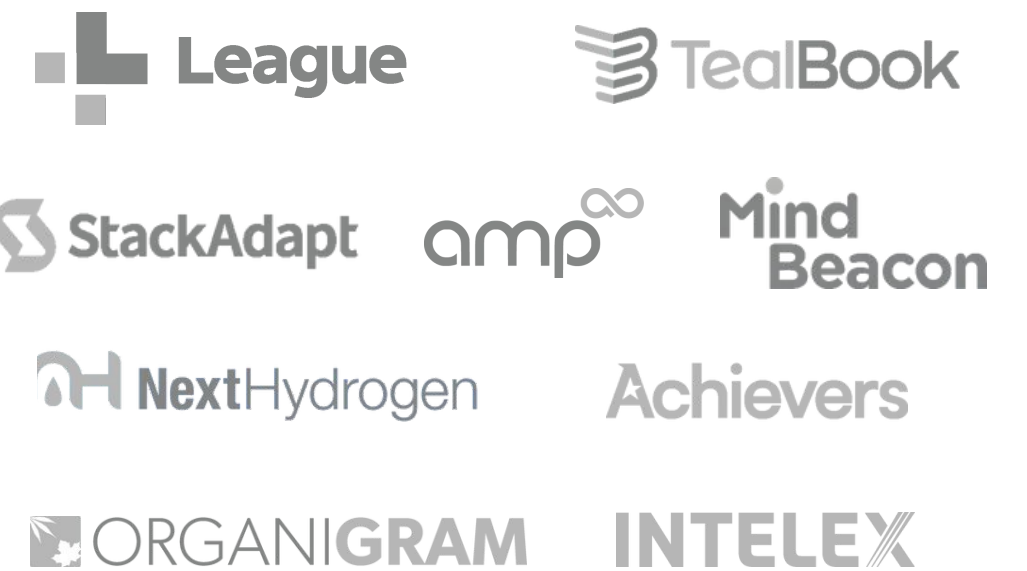
FINANCE TRANSFORMATION EXPERTS

We work with clients to help them determine the people, processes and systems they need at every stage of growth.

VERTICAL SPECIALISTS

We're experts at building finance and accounting teams because that's all we do! Not sure what you need? Let us help!

 Trusted by:



Accounting & Controllership



Financial Planning & Analysis



Financial Reporting



Internal Audit & Risk Assurance



Treasury



Corporate Development

Executive Search • Project & Interim • Full-Time Hires

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