

Position Specification

Confidential **Chief Financial Officer**

The Company

For 25 years our client has been the industry-forerunner and leader in developing and deploying advanced technology to promote highway safety, save time, fuel and money, and reduce emissions. The company, headquartered in the Southwest United States, has roughly 200 employees and annual revenues of \$70M.

Previously, the company was a wholly-owned business of a publicly-traded, technology-based business process outsourcing company. This changed in June of 2018 when the company was purchased by an infrastructure investment firm headquartered in Connecticut. For the first time in the organization's history, the company is now a completely standalone entity.

While the company has a significant number of seasoned leaders who will remain with the new, stand-alone entity, it is clear the organization needs to add additional talent. One of those needs identified is a Chief Financial Officer

The Position

Overview

The Chief Financial Officer will be responsible for overseeing and managing the financial and accounting functions for the company. This includes leading the financial decision-making that affects the company, and will provide strategic financial input to senior management. The successful Chief Financial Officer will play a key role in developing and implementing financial procedures to improve and maintain the financial health of the company.

Location

Southwest United States

Reporting Relationship

The Chief Financial Officer will report directly to and be a key business partner for the Chief Executive Officer. This position will manage an accounting and financial team of 10 to 12 people encompassing a financial operations (accounting) department and a financial planning and analysis department. This role will work with other members of the executive management team at the company and be a key overall leader for the entire organization. The Chief Financial Officer will represent the company to the HELP organization, working particularly with their Chief Executive Officer, Chief Operating Officer and Chief Financial Officer, as well as other trucking industry clients. Additionally, the Chief Financial Officer will represent the company to other outside parties as well (i.e. industry associations, etc.).

Responsibilities

- Manage and improve financial models, annual budgets/forecasts and reporting processes.
- Provide accurate, timely and complete financial information and business analytics to ensure the company is effectively meeting the strategic operating plan and adhering to the long-term roadmap.
- Generate regular monthly, quarterly, annual and other ad hoc financial and operational reporting packages.
- Lead discussions about the company's financial performance.
- Oversee long-term budgetary planning and cost management in alignment with the company's strategic plan.
- Ensure department is efficiently and effectively handling all transactional processing for the company.
- Manage the company's cash flow to ensure that the company has the proper levels of working capital to meet the overall cash needs of the business.
- Safeguard all company capital, resources and assets and ensure they are deployed toward their highest and best use.
- Own and develop a robust set of analytics, metrics, and reporting. Develop recommendations (both strategic and tactical) resulting from assessment of data.
- Perform financial analysis on both a repetitive and ad hoc basis. Interpret situations not just by the book, but by being a business partner across the organization.
- Continuously analyze the company's financial operations, identifying opportunities for improvement and cost reduction.
- Ensure that effective internal controls are in place and that there is compliance with GAAP and applicable federal, state and local regulatory laws for financial and tax reporting.
- Oversee the company's tax and regulatory requirements, ensuring that all appropriate returns and documents are filed in a timely manner.
- Provide critical financial and operational information and analysis to Alinda Capital.
- Develop and maintain strong relationships with banking organizations and representing the company to the same.
- Represent the company to and provide great service for the HELP, Inc. organization.
- Manage the company's financial risk and overall risk management function.
- Other duties as assigned by the Chief Executive Officer.

Travel

Minimal travel is expected for the Chief Financial Officer.

The Candidate

Education

Bachelor's degree in finance, accounting, business or related field. Master's degree in business is preferred.

Professional Qualifications

- Professional accounting designation (CPA or CMA).
- 10+ years' experience in a senior financial managerial position (including experience working in industry as an accounting/financial officer).
- 15+ years of business experience with a track record of progressive accounting/financial positions, including significant management responsibilities.
- Strong knowledge of Generally Accepted Accounting Principles.
- Experience in a high-volume transaction processing business would be preferred. Also experience in a start-up or a spin-off organization would be viewed positively.
- Big 4 public accounting experience, particularly in the area of audit would be a positive.
- The combination of a large company and a smaller company would be optimal.
- A proven track record of attracting, motivating, developing and retaining talented people.
- Demonstrated leadership, working with senior level executives in a fast-paced environment.
- Previous experience working with a comparably-sized standalone company that is financially-backed (i.e. private equity, etc.).
- Understanding of not-for-profit and/or public/private partnerships.
- Expertise in each of the key disciplines; accounting, cash management, financial planning and analysis, financial systems and operations.
- Track record of helping to establish an overall business strategy and executing on that strategy while interacting effectively at all levels of the organization.
- Strong background in developing, implementing, maintaining and improving processes and procedures.
- Ability to assume leadership of an already existing team and take them to the next level.
- Previous experience working in a geographically dispersed organization.
- Proven ability to determine key business issues and develop action plans.
- Ability to balance multiple projects and meet necessary deadlines.
- Strong Excel and PowerPoint skills coupled with an understanding of ERP systems. Experience implementing an ERP system would be a strong plus (the Company currently utilizes Oracle as its ERP system).
- Personal acumen to handle sensitive and confidential strategic corporate information appropriately.
- Capable of reviewing and assimilating complex data and providing succinct, concise summaries.
- Able to see current trends, predict future impact of these trends on the business and potential solutions and opportunities related to these trends.
- Must be a business partner able to facilitate conversation and make effective suggestions for positive outcomes.
- Must have the ability to see both the short-term and long-term impact of their decisions.
- An effective leader and executive who creates a team atmosphere in which people work enthusiastically and cooperatively to produce outstanding results.
- Experience working with debt covenants and experience with contract review.

Personal Characteristics

- Curious by nature with the ability to quickly assess a situation and then develop/implement an effective solution.
- Strong analytical skills to identify and communicate opportunities for cost controls, optimization of operations, transportation management and customer-service strategies.
- An intelligent leader with sharp business acumen and good people instincts.
- Organized, focused and able to operate in a lean environment.
- Conservative and optimistic; someone who uses logic and leverages available data to build business cases and make decisions.
- Excellent verbal, presentation, communication (both written and oral), interpersonal, and negotiation skills, including the ability to communicate complex financial ideas to a non-technical audience as well as influence others.
- Customer-focused, business leader with sharp business acumen and good people instincts.
- Organized, focused and able to operate in an entrepreneurial environment.
- Demonstrated success and belief in a merit-based culture where performance standards are high and mediocrity is not tolerated.
- Demonstrate consistent adherence to ethical standards.
- Leadership skills to translate a vision into specific strategies and objectives.
- Must possess an enjoyment of challenge and a desire to build a business.

To learn more about this opportunity or provide a confidential referral, please contact:

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