

## CASE STUDY

### Search for a Manager of Financial Planning & Analysis

#### Client

A healthcare provider with \$276 million in revenue, 170+ locations, and 2,000+ employees.

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#### Challenge

This company is private equity owned with a relatively new CEO who has refocused the mission on providing a high-access, tech-enabled healthcare experience in local communities, and is aiming to grow the company to \$750 million in revenue within 4 years. This growth plan led the CFO to prioritize a need for a #2 leader in Financial Planning & Analysis, someone who could dive in and take ownership of the financial and operational analytics, take on a visible role with the executive team and the operations, revamp multiple forecasting models and dashboards, and manage a team of analysts.

This search was challenging on multiple levels. The company did not have big name recognition with finance professionals in the Phoenix area so there was a large need to communicate the story to the marketplace. The CFO sought someone who had previously worked in a private equity ownership environment, who had experience with a multi-location business model, and who had led or been intimately involved in significant change management processes and initiatives. The ideal candidate was someone who had not just handled an established daily/monthly/annual FP&A cadence, but someone who had also taken clear initiative to leverage data and analytics to change and improve financial processes and company operations.

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#### Strategy

Our search strategy focused on reaching out to an initial list of over 300 Senior Financial Analyst and Finance/FP&A Manager candidates throughout the Phoenix, AZ metro area. We narrowed these down to candidates with experience in various relevant industries, including hospitals and healthcare, retail, restaurants, banking and financial services, education, manufacturing, and other industries with multiple locations, branches, or units. We also focused heavily on experience with smaller to mid-sized companies under private equity ownership.

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#### Results

We presented 6 candidates in total to our client, of which 5 were interviewed and 1 was hired. The candidates presented came from a mix of education, insurance, healthcare, banking, and consumer products industries.

The individual hired came with 11 years of total experience, including 7 years in FP&A, experience supporting several multi-location business models (most recent supporting 140+ schools, and prior supporting 40+ regional offices), and many past examples of deep-dive financial modeling and analytics projects that led to actionable insights. This person also matches the company's core DNA characteristics as an independent thinker and creative problem solver with a sense of humor, flexible style, and high standard of personal and professional ethics.