



SIGNATURE ANALYTICS

We Deliver the Help You Need. When You Need It.

THE RIGHT FIT

How We **Fit** Your Business

Our approach is designed with **flexibility** in mind based on your company's needs. Typically, every engagement begins by utilizing one of our two team structures. Our local team supports you by working on-site as well as remotely to achieve your goals.

We Can Serve As Your Entire **Accounting** and **Financing** Team.



Or We Can **Complement** Your Internal Employees,
Such As Your Bookkeeper or Controller.



4 Key Roles Cover Levels of Expertise

Roles and responsibilities are **clearly defined** with the appropriate time allocated to get the job done right.

The Bookkeeper	The Accountant	The Controller	The CFO
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Accounting vs. Finance Department: Key Focus and Responsibilities

The Accounting View

- Historical perspective
- Focuses on getting it right
- Focuses on planning and control in accounting function
- Provides consistent, timely, and accurate reporting

The Financial View

- Future, strategic emphasis
- Explains numbers in the context of your business
- Business advisory focused
- Interprets and analyzes data to make smarter proactive decisions



Daily / Monthly / Annual - **Scope of Work**

The **key tasks** performed at every stage within an ongoing engagement:

Daily scope includes:

Invoicing and collections, managing paying vendors, and cash flow monitoring

Monthly scope includes:

Credit card and bank reconciliations, payroll support, closing the books, financial reporting, budget variance, financial analysis, KPI review, inventory review

Quarterly scope includes:

Tax prep support, year-end close out, budget development, inventory control and valuation, strategic planning, contract reviews, vendor reviews

Our Methodology

These 5 elements are our “**secret sauce**” to providing long-term success:



People

We provide timely, high-quality services delivered by very skilled, qualified, and friendly people ready to get the job done.



Structure

We're on your team. We put the right person, in the right job at the right time. This structure provides a higher level of service at a lower cost than adding additional in-house, full-time employees.



Process

Accounting touches every part of your business. Our team focuses on developing processes for control and improvement to ensure timeliness and consistency in the accounting department function.



Technology

The right tools and technologies give you all the control you need. Our tools make it easy to collect data in order to provide insightful analysis using specific metrics and data analytics.



KPI/Analysis

What gets measured, gets managed and creates accountability. Through this, you'll better understand the drivers of your business in order to make more decisive and actionable decisions to achieve your goals.

Take the Next Step

Understanding our model is essential for a **successful, ongoing engagement**. Schedule a **15-minute discovery call** with a **financial expert** to help us better understand your business goals.