


 WHAT WE DO

STRONGER FINANCE AND OPERATIONS THROUGH DATA STRATEGY AND AUTOMATION.

For SMBs and PE-backed companies — faster close, cleaner reporting, clearer margins, without ripping out the tools you already use.

We help owners and operators make better decisions by connecting finance knowledge with data engineering. The result is faster information, less manual work, and a clearer picture of what's happening across finance, marketing, and operations — built on the tools you already use.

QuickBooks · NetSuite · Sage · Dynamics · Power BI · Excel · SharePoint · custom CRMs · API integrations

 WHO THIS IS FOR

PE OPERATING PARTNERS

REPORTING THAT REPLICATES ACROSS THE PORTFOLIO

Multi-entity consolidation, QoE-aligned packages, quarterly board prep, and infrastructure built to scale across add-ons.

CFOS & COOS

THE SYSTEMS A FINANCE LEADER CAN OPERATE FROM

Close acceleration, automated reconciliation, GL cleanup, unit economics — complementary to finance leaders.

OWNERS & OPERATORS

VISIBILITY AT THE INFLECTION POINT

Margin clarity, automation that frees the team, and decision support when the business is moving faster than the books.

 SERVICES

01	DATA ENGINEERING <i>The foundation everything else is built on.</i>	System integrations · ETL pipelines · Data warehouses · Legacy ERP extraction · Single source of truth
02	FINANCIAL OPERATIONS <i>Finance, faster and cleaner.</i>	Close automation · Multi-entity consolidation · Unit economics · Investor-grade reporting
03	BUSINESS ANALYTICS <i>Visibility into what's actually driving your business.</i>	Executive dashboards · ROAS tracking · Margin by job · Cohort & retention analysis
04	PROCESS AUTOMATION <i>Manual work that runs itself.</i>	Auto-reporting · RPA workflows · Exception alerts · Reconciliation engines
05	DECISION SUPPORT <i>Turning data into a clear picture of what to do next.</i>	KPI architecture · Scenario modeling · Driver-based forecasting · Board packages

 WHAT CHANGES — OUTCOMES FROM RECENT ENGAGEMENTS

WHOLESALE DISTRIBUTION · PE-BACKED

\$4.1M

REVENUE SURFACED

Opportunities identified across a \$65M product portfolio — from a data model nobody had been querying for ten years.

CONSUMER GOODS · PE PLATFORM

3 → 1

SYSTEMS CONSOLIDATED

Adagio, Sage 50, and QBO unified into one investor-grade reporting package with QoE reconciliation.

INDUSTRIAL MANUFACTURING · PE-BACKED

7%

MARGIN LIFT VALIDATED

Bottom-line improvement confirmed through job-level labor visibility. Additional 7% scoped from material tracking.

E-COMMERCE · GLOBAL MULTI-ENTITY

3-4 HRS

MANUAL WORK ELIMINATED

Monthly merchant reconciliation across four payment processors replaced with an automated 3-way match engine.

 HOW TO START

30-MINUTE CALL. NO CHARGE.

No slides, no pitch — just a conversation about what's not working.

ONGOING
RETAINER

Monthly. Recurring work, sustained presence.

DEFINED SCOPE
PROJECT

Bounded engagement with a clear output.

UNDER 10 HRS
HOURLY

Diagnostic reviews, targeted fixes.