



A **Better** Experience

FinTech

Helping FinTech Companies Achieve their Strategic Goals

The FinTech space continues to be extremely vibrant. Aiming to compete with traditional methods in the delivery of financial services, more and more businesses are now utilizing these innovative technologies to enhance and improve financial services and processes. During periods of rapid growth, FinTech companies are not always able to focus on building a scalable operational infrastructure. From early series funding through IPO readiness and beyond, we work with FinTech companies at all stages of their life cycle by helping to optimize their finance, accounting, and operational functions in order to ensure that management's focus is on product optimization and growth.



How We Can Help

CrossCountry focuses on providing operational solutions to FinTech companies, allowing them to scale their internal processes and systems in a manner that keeps pace with their product and revenue growth.



Scalable Compliance

As your business grows, you need scalable solutions to remain compliant with all requirements, including GDPR, KYC/KYS, ISO and SOC 2.



Security for Peace of Mind

Having the right cybersecurity solution to protect PII, PCI, and company data can be the difference between a growing, thriving business and salvaging one.



CFO Services

We help navigate through the complex financial and accounting environments with our scalable and flexible accounting, financial reporting, and audit support solutions.



Value-Added Data & Analytics

As your infrastructure grows, it is critical to stand up a data governance program and establish policies and procedures.



Integrate Without Delay

Instead of creating workarounds, FinTech companies need scalable solutions to ensure their ecosystems deliver a seamless platform and interface.



Strategic & Analytical Insights

Our solutions help manage the key data that helps drive the strategic and operational decision-making process, differentiating you from market competitors.

Our Experience



Case Study: CFO Support & Transaction Readiness

Challenges

A high-growth FinTech company was seeking to go public in 12 months. They had experienced rapid organic growth, which put a strain on the existing finance function and team, especially as they were strategizing for the public listing and their first full audit. Management was also considering an acquisition that would need to be fully integrated prior to going public, for which the team lacked the appropriate technical skills. As part of this overall strategy, they were also considering upgrading their technology stack.

Our Approach

We assisted management in performing a “health-check” of the finance function that focused on people, process and technology, and areas for potential enhancement and performed an IPO readiness assessment to identify investments needed prior to an IPO. To prepare them for their audit and acquisition, we provided audit support assistance, including project management, and preparation and documentation of relevant accounting policies and procedures, and developed an M&A playbook, including an accelerated integration strategy. Finally, to assist in the technology stack upgrade, we developed a technology strategy to augment their existing system capabilities, including the implementation of Sage Intacct to replace QuickBooks, Adaptive Insights for budgeting, and FloQast for automated monthly close processes.

Outcome

We developed an executable “go public” strategy for the finance and other functions, a strategy for the Office of the CFO that would meet the growth trajectory of the company, and a playbook that can be used for future M&A acquisitions and integrations. Our engagement also enabled them to establish a repeatable audit process and supported the development of better analysis, review, and preparation of key financial and operational information.

Contact Us



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