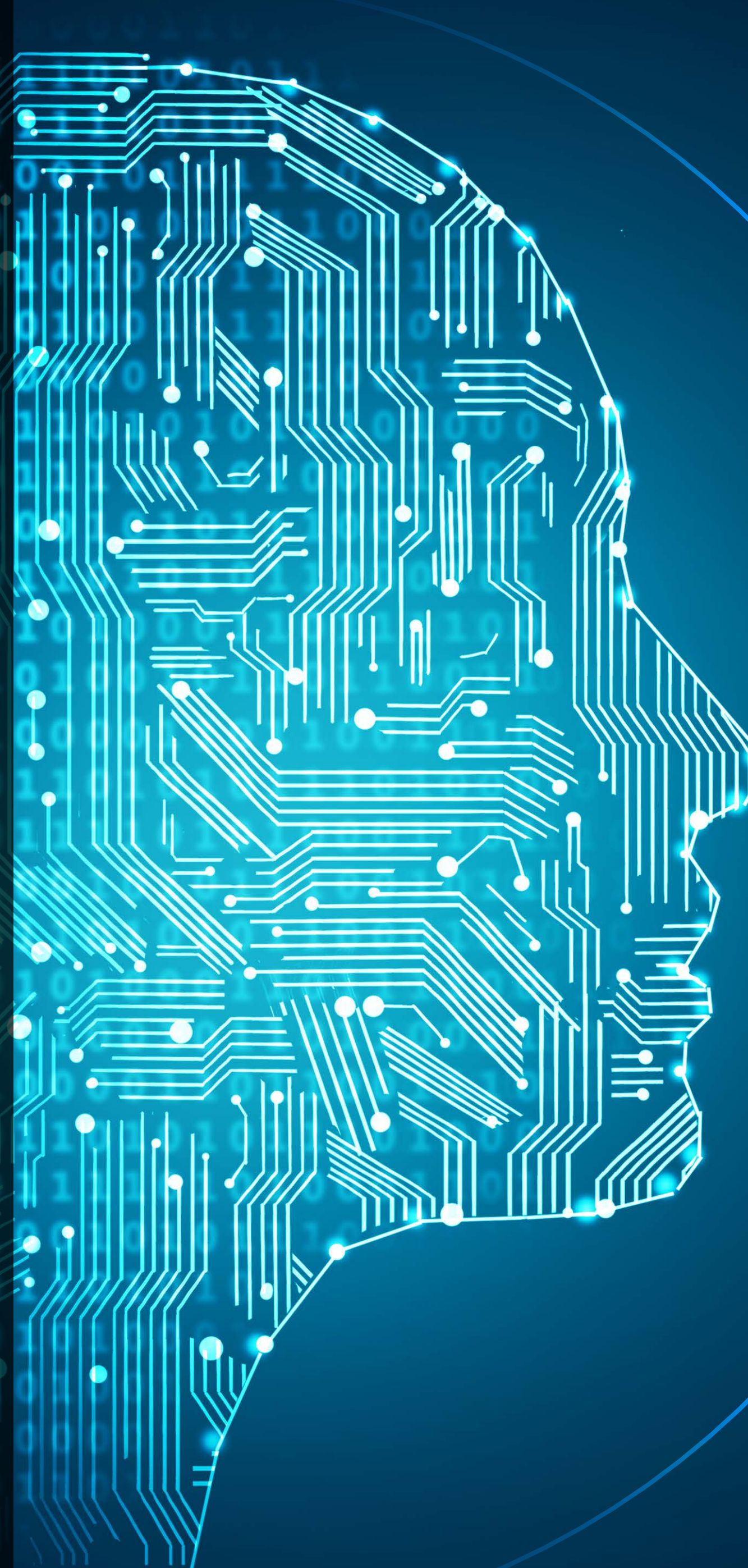


## CASE STUDY SCALE/ EXPANSION

- ▶ Conducted multi-level organizational assessment.
- ▶ Developed 3 phase transformational program for Finance.
- ▶ 5 roles, identified in plan, successfully placed.

### POSTS APPOINTED

- ▶ Corporate Controller
- ▶ Fund Controller
- ▶ Assistant Fund Controller
- ▶ Portfolio Controller
- ▶ Senior Accountant
- ▶ Corporate Accounts Payable Manager



### UNIQUE CLIENT - SCALE/EXPANSION REFERENCE CASE

- ▶ Investment management firm focused on sustainability-driven strategies and products for institutional investors.
- ▶ Organic growth delivering assets under management (AUM) of c\$1.2bn (December 2020).
- ▶ Developing capability and capacity to achieve AUM of c\$5bn by 2028.
- ▶ Growth of c200% in assets under management in three years.
- ▶ Planning strategic development of products, global reach, LP client base and new partnerships.



### COMPLEX BRIEF

- ▶ Organizational assessment of current Finance capabilities and expected future needs
- ▶ Work closely with VP Finance to refine talent profiles for a niche company in a restricted labor market
- ▶ Develop transformational plan to optimize and future proof the Finance organization
- ▶ Deliver efficient search processes for timely placement of immediate and mid-term hires.



### WINNING METHODOLOGY

- ▶ In depth company analysis through desk research and interview with senior management.
- ▶ Formal review and interviews with F&A team to understand structure, responsibilities and outputs.
- ▶ Assessment of FinOps development against company initiatives across one, three and five-year horizon.
- ▶ Defined resource and talent needs, process and control weaknesses, and expertise required for strategic development – 3 Stage plan developed.



### DELIVERED OUTCOMES

- ▶ Delivered 3 stage plan: Stage 1 – Critical Issues, Stage 2 – Support Growth, Stage 3 – Resilience.
- ▶ Two Stage 1 appointments. agreed and made within 8 weeks.
- ▶ Stage 2 appointment of Financial Controller for portfolio company agreed and made within 6 weeks.
- ▶ Stage 3 appointments Senior Accountant and Assistant Fund Controller.
- ▶ TALTRAN operating as strategic partner in organizational development and talent recruitment.