



Types of Projects Delivered by Vallon Finance

Vallon Finance will deliver a senior finance professional with specific project experience.

- Important projects that day-to-day business allow little time to address
- Immediate or discreet issues facing your business
- Interim role to fill open position on your senior finance team
- Initial CFO for emerging growth firm to assess long-term finance needs

Growth Opportunities

Acquisitions

- From analyzing targets (cultural fit, etc.) to valuation to integration planning

New Product Rollout

- Analyze operational and financial impact/requirements for implementation and on-going support
- Planning for rollout

Geographic Expansion

- Development of business case for expansion – including impact on existing management team, infrastructure required
- Providing cultural, financial and operational guidance for overseas expansion

Technology Investment/Strategy

- Work with CIO team to align new investments with existing technology
- Impact beyond investment: Impact on business/costs

New Client Segment

- Alignment of current product set with new clients – operational/financial impact
- Long-term impact on growth

New Sales Channel/Pricing

- Cost to hire/retrain to build and support new sales channel
- Pricing scenarios for future business and conversion of existing business
- Evaluation of competitive position

Accounting/Process/Control

- Analysis of Close procedures – methods to improve
- Review of processes and information flow
- Controller talent to review specific accounts or supporting systems (fixed assets, inventory, etc.)

Business Analysis

Management/Board Reporting

- Align reporting with strategy and board requirements
- Ensure reporting enables decision making

Core Profitability of Business

- Identify/Analyze the source of profitability and variables to improve

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Key Metrics/Scorecards

- Work with operating team to identify business drivers and internal/external metrics
- Test information with historical data

Turnaround/Exit of Business

Turnaround of Business

- Identify strategies for cost containment, cash management and growth

Sale or Shutdown

- Preparation of package/due diligence for purchasing firm to maximize price
- Oversee orderly shutdown of business to limit cost exposure

Interim Management

Filling Open Senior Finance Position

- Keeping a role operational until a long-term placement is completed

Staff Management

Staff Mentoring/Career Development

- Improvement in retention and productivity by assisting staff with their skill development and career path

Restructuring of Finance Team

- Align financial resources with on-going needs of firm
- Improve quality of work distribution, reporting structure/career progression, and speed of delivery

Corporate Governance

Analyzing Employee Benefits

- Balancing employee retention benefits with cost

Effectiveness of policies/procedures

- Analyze impact on cost and management time

Early Stage/Emerging Growth

Creating a Compelling Investor Pitch

- Building a strong business and financial plan to attract investors

Adding Your First CFO

- Use of an interim CFO to determine your long-term finance team needs

Going Public With a Private Team

- Provide guidance the existing management team get through IPO event

SOX/SEC Compliance

Other Duties as specified

- Just like the job description, our Finance Professionals have an amazing background to address needs not listed above