

# Case Study: 3-Tier Financial Strategy

Next Gen Owners Fuel Growth with Expanded AIOA Services



0000 **AIOA** Accountant



**AIOA CFO** 



## Client

Commercial Reseller / Installer / Manufacturer.

New management.

Bookkeeper leaving.

New growth plans.

Shore up financial systems.

Address growing business complexity.

Expanding to new markets.

## First Step

Client needed to replace bookkeeper. Needed more complex accounting help to manage change into the future.

#### **AIOA Action**

Handled immediate needs of managing the books and the day-to-day financial operations.

## **Second Step**

Client needed to assess next steps in building their financial systems. Wanted another level of oversight on their financial health.

#### **AIOA Action**

Helped client better understand the Income Statement, Balance Sheet, and profit margins. Identified other key changes in accounting infrastructure, i.e., changing to QuickBooks.

## **Third Step**

Client's growth led to investment in more manufacturing. Required more specialized finanical serices expertise and insight.

#### **AIOA Action**

Developed strategy around product lines and funding. Provided instant and relevant data to act on for results. Alleviatied stressors and identified risky gaps. Provided trend analysis, graphs, KPI's, integrating forecasting with both the Income Statement and Balance Sheet on a monthly basis.