

# You Don't Need a Bigger Finance Team. You Need a Better Model.

**How Consero's process-first, technology-curated approach to finance is replacing the build-it-yourself playbook for PE- and VC-backed organizations.**





**Scaling a finance function inside a high-growth, investor-backed company is expensive, fragile, and slow. Consero Global changes that.**

Through its Finance as a Service model and Flex services, Consero gives PE- and VC-backed organizations audit-ready books, real-time visibility, and a finance function that scales with the business — without the overhead.

The result: Portfolio companies that move from initial investment to exit with the financial infrastructure investors expect, and the operational speed that growth demands.



# CONSERO

Fueling Financial Greatness

Consero delivers tailored solutions that scale with each client's unique needs and growth trajectory. The organization serves a wide variety of industries including:



Software



Investment management



Healthcare



Services



Nonprofit organizations



Senior living

**50%+**

YoY client revenue growth sustained

**200+**

Client acquisition integrations

**50+**

Successful client exits supported

**60-90 days**

from engagement to live financials

# The challenge PE-backed finance teams face

## Why investor-backed companies outgrow DIY finance

Private equity-backed and venture-funded companies face a paradox. They need investor-grade financial reporting, clean audit trails, and real-time visibility into cash, revenue, and margins, but they rarely have the team and infrastructure to deliver it. The typical path—hiring a controller, purchasing an ERP, bolting on reporting tools, and staffing an AP/AR team—can take years and cost multiples of what the business can justify at its current stage.

The cost of getting it wrong is severe. Inaccurate data erodes investor confidence. Slow diligence responses stall deals. And poor books at exit risk deal value at the worst possible moment—depressed valuations, extended timelines and friction at critical times.

Consero's Finance as a Service model was built on a different premise: that a purpose-built operating model—one that combines process discipline, curated technology investment, and dedicated teams with deep accounting expertise—could replace the traditional build-it-yourself approach entirely. Two decades and 1,800 employees later, the model has been proven across hundreds of engagements, more than 200 client acquisitions, and over 40 successful exits.

*"It is an absolute beautiful thing to not have to worry about the technology involved with closing on a monthly basis, staffing associated with a monthly basis. All tools, that's on Consero — that's for them to help us get there quicker, to close quicker, to get the reporting quicker."*



— Chad Denton, CFO,  
Findhelp



## Growing market pressure

### What's changed and what's at stake for PE-backed organizations

The demands on the finance function have intensified. PE sponsors expect faster reporting cycles, tighter KPI tracking, and always-on diligence readiness. At the same time, the technology landscape has fragmented: countless point solutions compete for attention across payments, general ledger, FP&A, and automation, each with its own implementation burden and AI narrative. For a CFO at a \$20–\$50 million portfolio company with a two-person finance team, the risk of choosing the wrong tool, or worse, choosing the right tool and implementing it poorly, is substantial.

## The cost of inaction



### Difficulty raising capital:

Businesses struggle to raise capital or debt due to a lack of real-time visibility and audit-ready financials.



### Reduced company valuation:

Poor finance and accounting (F&A) infrastructure leads to a lower company valuation during exit or funding rounds because the business can't provide "buttoned-up" documentation to investors.



### Lost revenue and overpayments:

Inefficient transactional processing and a lack of formal controls make companies more susceptible to lost revenue, vendor overpayments, and internal fraud.

# Consero's strategic approach to technology

## How Consero evaluates, selects, and deploys technology for portfolio companies

Consero's technology philosophy starts with a question most companies skip: does this platform's intelligence come from deep, proprietary client data, or from a publicly trained model? The distinction matters enormously for finance, where outputs need to reflect a company's actual revenue patterns, cost structures, and industry benchmarks — not generic predictions.

An enterprise-grade ERP sits at the core of the firm's technology stack. For the majority of its engagements, that platform is Sage Intacct, a system purpose-built for mid-market financial management.

But the ERP is only one component. Consero's technology curation extends across the full finance stack — payments, expense management, FP&A, and automation — evaluating each tool not just on feature sets but on data integrity, security posture, deployment speed, and how well it integrates into a portfolio company's existing workflows. As one client put it:



*"They leverage it across multiple clients, and I'm able to tap directly into their existing model."*



— Chad Denton, CFO,  
Findhelp

*"The partnerships that Consero as a whole has with other companies is super helpful. They do a good job of bundling everything, and having those preferred partnerships makes implementation and management of the system super helpful."*

— Nick Foster, VP of Finance,  
Quantum Rise

## The onboarding journey



Company's existing financial framework evaluated



Mapped against a standardized operating model



A proven foundation tailored to each client's specific needs

## The engagement in practice

### How Consero works from onboarding through ongoing delivery

At its core, Consero is a process firm that happens to do accounting. That distinction shapes every engagement, from onboarding through ongoing delivery.

#### The onboarding journey

Before a new client engages, Consero's team begins by evaluating the company's existing financial framework: chart of accounts, order-to-cash workflows, procure-to-pay processes, and general ledger structure. The team then maps this against a standardized operating model—retaining what works, replacing what doesn't, and layering in the customizations the client's business demands.

The result is a hybrid: a proven process backbone tailored to each client's specific revenue model, entity structure, and reporting needs.

This approach allows Consero to get clients fully operational—with tools like Sage Intacct and BILL configured, reporting live, and all financial processes transitioned—in 30–90 days. That timeline stands in sharp contrast to the multi-year ERP implementations that plague the mid-market.

*"We were live within two months with everything running. I've seen a company where it took three years to get their ERP up. Having that speed was huge."*



— Nick Foster, VP of Finance, Quantum Rise

# A modular framework and approach to AI

Consero's delivery model is built on a standardized orchestration layer — the sequence and logic governing how financial processes run — that remains consistent across all client engagements. That foundation means proven workflows for close, reporting, and compliance are never rebuilt from scratch; every new engagement inherits the rigor of hundreds that came before.

Within that framework, individual modules flex to fit the client. Procure-to-pay is highly standardized, powered by a rules engine and LLM-based invoice coding that processes transactions with minimal manual intervention. Order-to-cash, where billing structures vary widely, uses custom modules tailored to each client's commercial model.

That process discipline now has a compounding advantage: every documented workflow can be converted into an AI prompt. Two decades of codified accounting processes across hundreds of engagements have become the raw material for Consero's AI strategy — a training set competitors cannot replicate without the operating history to produce it.

*"For the longest time, the focus has been on building processes. And processes can be converted into prompts. That's where the value add is."*



— Mitt Mehta, EVP of Client Services, Consero

## Build, Platform, Ecosystem

Most outsourced accounting firms talk about AI. Consero is operating it across three connected layers.

1

**Build.** Consero has already deployed internal AI agents for audit and transactional accounting, with more in development. Each agent inherits the process rigor codified across hundreds of prior engagements.

2

**Platform.** On top of the ERP sits Consero's proprietary reporting portal — the surface where AI-driven scenario planning, cash forecasting, and strategic analytics are delivered to the CFO's desk. The design principle is authentic AI: intelligence grounded in a specific company's real transaction data rather than generic models trained on publicly available information. Because AI sits on a governed data foundation built from real client operations, the insights reflect how the business actually runs.

3

**Ecosystem.** Rather than passively consuming partner platforms, Consero operates an integrated roadmap with its core technology partners. Product and engineering leadership meet regularly with partner teams, compare roadmaps, and allocate resources accordingly. If a partner is shipping a capability next quarter, Consero redirects its engineers elsewhere. If a critical workflow is eighteen months out, Consero builds it now — often using MCP servers and API access to extend partner platforms without waiting for them to catch up.

## The discipline behind the technology

Process rigor and technology investment only matter if they produce reliable financials. Consero holds controllers to a 100% accuracy target on client financials, with upstream teams targeting 95% and controllers responsible for closing the remaining gap — metrics tracked monthly and reviewed quarterly. Client communication runs in two parallel tracks: practice directors maintain strategic relationships with executive sponsors, while controllers and VP-level staff manage day-to-day operations through daily coordination calls, monthly steering committees, and quarterly business reviews.

# Consero in action for PE-backed businesses

## How two portfolio companies transformed their finance operations

Findhelp is a social-impact SaaS platform that connects individuals in need with community-based programs and services. With more than 30 million users and a network of 600,000 community organizations, the platform has grown at a rate of 50% year-over-year for the past four to five years. Its CFO, Chad Denton, runs the finance function with just two internal team members—an FP&A professional and a staff accountant—while Consero’s team manages everything else.

When Findhelp recently closed a significant PE investment, the relationship proved critical: the team fielded more than 700 diligence requests, often turning deliverables around overnight thanks to the time-zone advantage leveraging Consero’s offshore team.

*“Anything that was accounting or historical in nature, we lobbed those over to the team. They could work on them overnight while we’re asleep, and the next day we could have the data ready. We kind of get to a 24/7 model.”*



— Chad Denton, CFO, Findhelp

Denton’s reporting philosophy is narrative-first: rather than delivering raw financials to the board, he provides a 10–20 page document that contextualizes performance, highlights key events, and proactively addresses areas of concern. Consero’s infrastructure makes this possible by ensuring the underlying data is accurate, current, and accessible in real time.

## Findhelp by the numbers

**50%+**

Year-over-year revenue growth sustained for four to five consecutive years

**30M+**

Users served on the platform, approaching 40 million

**2**

Internal finance team members (excluding CFO)—FP&A and accountant

**700+**

Diligence requests fielded during recent PE investment, many turned around overnight

**60-90**

Days from engagement to fully operational Finance as a Service implementation

### Quantum Rise: Built for acquisition from day one

Quantum Rise is a PE-backed AI consulting firm founded by Erie St. Capital. Nick Foster, VP of Finance, brought Consero on board just months after the company's inception before the volume of financial activity would have justified a full internal team. The bet paid off when Quantum Rise closed its first cross-border acquisition, a firm in Brazil, less than two years later.

Consero's team managed the chart-of-accounts mapping, converted the Brazilian entity from cash-basis to accrual accounting, consolidated historical financials into Sage Intacct, and established ongoing reporting workflows, all while Foster focused on strategic deal execution.

*"If someone were to come in from the outside, I'd probably pay one of the Big Four and it's at least another zero on the cost. And they wouldn't know the business. Having a team that knows the business and being able to just flip the switch—that's huge."*



— Nick Foster, VP of Finance, Quantum Rise

Foster describes Consero not as a vendor but as his finance team. With eight to ten professionals supporting Quantum Rise across AP, AR, controllership, and strategic finance, he has access to specialized expertise that no single hire could replicate—at a fraction of the cost.

## Quantum Rise by the numbers

~2 months

From engagement to live financials on Sage Intacct

8-10

Consero team members supporting Quantum Rise across all finance functions

1

Cross-border acquisition (Brazil) fully integrated including chart of accounts, accrual conversion, consolidated reporting

1

Internal finance professional. That's it.

# What's next for PE-backed finance

## How Consero is looking ahead for PE-backed startups

Consero is in the midst of a deliberate transformation—not just what the firm delivers, but how it serves the market.

Three shifts define the road ahead:

First, deeper technology curation. Consero has invested in hiring professionals directly from its partner ecosystem—including the first dedicated Sage Intacct specialist—to deepen the firm's ability to leverage its core technology stack. With a growing engineering team and multiple AI-powered use cases now in production, Consero is building exception-based workflows that reduce manual effort in accounts payable, vendor management, and cash application.

Second, expanded service offerings. Beyond the core Finance as a Service model, Consero has launched Flex Finance—a

*"We're turning from a transactional partner to a strategic partner. We're fueling financial greatness for our clients and that means being the front end to all of these great technology companies on their behalf."*



— Dave Sawatzky, CEO, Consero Global

tech-agnostic engagement model that meets clients wherever they are in their technology journey, regardless of their existing platform. Advisory services, including FP&A integration, round out a full-spectrum offering.

Third, AI-driven insights for the front office. While current AI investments have focused on back-office automation, the next phase targets the client experience directly: AI-powered scenario planning, cash forecasting, and strategic analytics delivered through Consero's proprietary reporting portal.

## Ready to move (or exit)?

Whether your organization is preparing for its first institutional raise, integrating an add-on acquisition, or approaching exit, Consero delivers the financial infrastructure, technology stack, and strategic expertise to support every milestone.

Schedule a [30-minute consultation](#) to see what a modern, AI-enabled finance function looks like for your business.

#### About CPA.com

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#### About Consero

Consero is the AI-enabled, modular finance partner for investor-backed and growth-stage companies and nonprofits. The pioneer of Finance as a Service (FaaS), Consero combines best-in-class technology, AI-powered automation, and expert talent, to replace or upgrade in-house finance functions with better systems, faster reporting, and scalable operations. For more information, visit [conseroglobal.com](http://conseroglobal.com).

