

2x the Speed, 1/2 the Cost

The \$800K Advantage: How Source Advisors Used Flex Resources to Scale Technology and Sales Operations

Source Advisors needed to scale specialized capabilities quickly — modernizing technology operations while supporting a growing sales organization. Consero Global helped build integrated teams that accelerated execution, returned selling time, and delivered the work for roughly half the cost of building the same teams in-house.



5 → 40+
Technology
Team Members



30%
Selling Time
Returned



30
Sales Reps
Supported



6
-Week
Onboarding



\$800K+

Annual savings versus building the same engineering / technical and sales support teams in-house.

~56%

Lower cost
per role

About the Company

Built for Scale, Backed for Growth

Source Advisors is a specialty tax consultancy with over 40 years of experience helping businesses claim federal and state incentives, including R&D tax credits, cost segregation, and energy efficiency programs. Backed by BV Investment Partners, the company was entering a period of rapid growth that required scalable operational support and specialized talent.



Company Snapshot



Headquarters

Fort Worth, Texas



Engagement

Flex Resources



Functions

Technology + Sales
Support



Backed by

BV Investment Partners



Industries Served



Software



Financial Services



Manufacturing



Oil & Gas



Life Sciences

Two Critical Challenges



Technology

When CTO Jason Wilcox joined, the technology organization was a small legacy IT team with limited software development capacity and no formal data engineering or security function — facing growing modernization demands.



Sales Operations

With 30 salespeople and growing, administrative work was consuming valuable selling time. Processes varied by rep, creating inconsistent workflows, manual bottlenecks, and lost visibility.



“We needed a dedicated team that could specialize and grow with us.”

— Jason Wilcox, CTO, Source Advisors



CONSERO
Fueling Financial Greatness



SOURCE
ADVISORS

The Approach

Embedded Teams That Move as One

Consero and Source Advisors built a repeatable hiring and integration model tailored to both functions. Consero team members became integrated extensions of the Source Advisors organization — participating in sprint planning, standups, and strategic reviews. That integration drove execution quality and team cohesion.



01

Candidate Screening

Identifying the right technical profiles for each role.

02

Technical Evaluations

Rigorous assessments aligned to real project needs.

03

Hiring Standards

Consistent benchmarks across all engineering roles.

04

Cultural Fit

Ensuring team cohesion and long-term retention.



A Dedicated Deal Desk, Built to the Pace of Sales

Consero built a dedicated Deal Desk that grew organically, matching the pace of Source Advisors' expanding sales team without disrupting existing workflows.



"It didn't feel like an outside team coming in. It felt like one team moving faster together."

— Jason Wilcox, CTO, Source Advisors

The Results

Modernized Tech. Time Back to Sales.

Over approximately 2.5 years, Source Advisors expanded its technology organization from roughly 5 people to nearly 40 — a transformation that touched every layer of the technical stack, built on Azure and Microsoft Fabric with active AI/ML initiatives underway.



~ 40

Technology team members,
scaled from just 5



2.5 yrs

Total technology
transformation



4

Deal Desk members
supporting 30 reps



**Formal Data
Engineering**

A modern data foundation
built from scratch in Azure
and Microsoft Fabric.



**Expanded
Development**

Support for legacy
applications alongside
new AI/ML initiatives.



**Accelerated
Modernization**

Improved automation,
reporting & scalability,
and security posture.

Returning Time to the Sales Team



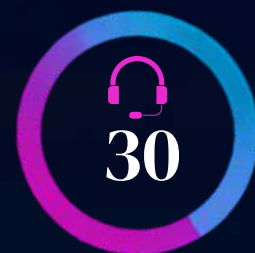
Selling Time Returned

25–30% recaptured across the org



Deal Desk Members

Supporting 30 sales reps



Sales Reps Supported

End-to-end enablement



‘Instead of training 30 salespeople on detailed operational processes, the Deal Desk specializes in ensuring information is entered correctly.’

– Sheryl Nazzaro, Director of Sales Support, Source Advisors

The Bottom Line

Specialized Teams at ~56% Less Than In-House

Building the same engineering/technical and sales support teams in-house would cost roughly **\$1.43M** a year in salaries. Through Consero's Flex Resources, they cost about **\$633K** — a saving of **more than \$800K a year**.



\$1.43M

Cost to build these teams in-house



\$633K

Annual cost through Consero



~56%

Lower annual cost than in-house

Function

In-house

Annual Savings with Consero



Engineering & Technical

\$1,094,000

\$542,296 • 50%



Sales Support

\$339,000

\$258,168 • 76%



Total

\$1,433,000

\$800,464 • 56%



\$800K+

Saved every year by running engineering/technical and sales support through Consero instead of hiring in-house.

A Scalable Model for Growth

Scale Specialized Functions Without Scaling Overhead

What began as a staffing solution evolved into a long-term strategic asset. Consero's Flex Resources model helps organizations build durable infrastructure that supports continued expansion — **faster than traditional hiring, and at a fraction of the cost.**



Scale Faster

Rapidly build expert teams across tech, finance, and sales support — beyond traditional hiring cycles.



Improve Agility

Respond to changing demands with a flexible, integrated talent engine.



Cut Cost

Deliver specialized roles at roughly half the cost of building the same teams in-house.

What Made the Partnership Successful



Start the conversation



See how Consero's Flex Resources model can help your organization scale specialized functions with speed, confidence, and real cost savings.



<https://conseroglobal.com/>