

# From Vision to Reality: How Insightful Questions Led to a Key Finance Hire

After experiencing steady growth for over a decade, an electronic discovery (eDiscovery) company's (the Company) CEO was eager to further elevate the business by embedding more strategic thinking into its operations. However, he recognized a clear gap: the need for a dedicated head of Finance to steer them toward these ambitious goals.

With a prospect already in mind, the Virginia-based CEO considered hiring a remote CFO based in Texas. But he realized the importance of having someone who could work in the office on a hybrid basis at the very least. This insight, therefore, forced him to reevaluate his approach to finding the right fit.

## The Power of Inquiry: Identifying the Ideal Candidate

Hearing this need, members of the Cherry Bekaert Advisory (the Firm) team engaged Cordia Resources by Cherry Bekaert, the Firm's Recruiting & Staffing Services arm, to assist in the search and placement of the perfect candidate to fill the role.

Together, our professionals began their journey with open-ended, focused questions essential for identifying and understanding the kind of employee the CEO truly needed and how he'd like to approach the hiring process. Through this collaborative dialogue, our team learned the CEO needed someone local who could help oversee all the Company's accounting and finance processes and be that "rising star" to not only assist with essential clerical and year-end tasks but also with any forecasting, short- and long-term planning, strategic planning, and potential mergers and acquisitions (M&A) and/or private equity activities.

Cordia Resources by Cherry Bekaert's Managing Director Nat Jones, who was based near the Company's Virginia office, then met with the CEO over coffee to delve even further into the desired qualities, both tangible (i.e., technical skills, location) and intangible (i.e., soft skills, growth-mindset) that the candidate should possess.



### CLIENT

eDiscovery & Litigation  
Support Service Provider



### INDUSTRY

Professional Services



### OUR ROLE

Executive Search

To prompt insightful discussions, we asked targeted questions, such as:

- ▶ What specific accounting and finance responsibilities will the new hire be managing on a day-to-day basis?
- ▶ What are the short-term and long-term financial goals for the company, and how do you envision this role contributing to those objectives?
- ▶ What technical skills and certifications are absolutely necessary for this role? Are there any preferred qualifications?
- ▶ How would you describe the company culture, and what qualities do you think will help a new hire thrive in this environment?
- ▶ What values are most important to you as a leader, and how should the ideal candidate embody these values?
- ▶ How do you envision this person interacting with other departments? What collaborative qualities should they possess?
- ▶ How important is it for the candidate to have a growth mindset and willingness to adapt to changes in the finance landscape?
- ▶ What are the biggest challenges the company currently faces in its finance department, and how can the new CFO help address these issues?

After sharing these criteria back with the Advisory team, Nat quickly identified a promising first candidate. However, just when an offer was on the table, the candidate surprisingly opted out. Undeterred, the CEO proceeded to conduct six more interviews, thoughtfully curated from a strong candidate pool compiled by the recruiting team. Within that pool, the CEO mentioned the potential hiring of three to four of them.

## Swift Success: Placing a Strategic Hire In Six Weeks

With one candidate distinguishing themselves from the rest, the CEO hired the Head of Finance, who showed potential and who the CEO anticipates will evolve into the CFO role within the next two to three years. The entire process, from uncovering the need to making the placement, took approximately six weeks – a relatively quick turnaround considering the hectic travel schedules that this CEO, and many others like him, often navigate.

### Your Guide Forward

At Cordia Resources by Cherry Bekaert, our recruiters use a tailored approach that not only considers immediate staffing and project needs, but also the company's long-term objectives in mind. Each recruiter brings deep industry experience that allows them to fully vet candidates for the right skills, vision for growth, and company culture fit.

Our dedicated team offers a comprehensive suite of services, including:

- ▶ Executive Search Services
- ▶ Management Consulting Interim Solutions
- ▶ Temporary Staffing Solutions
- ▶ Permanent Hire Search & Placement

Let us be your trusted resource in building a stronger team that resonates with your vision and goals. Contact us today!

### About Cordia Resources by Cherry Bekaert

Cordia Resources is a leading executive search, recruiting and temporary staffing agency that specializes in placing accounting, finance, human resources, information technology, contract administration, pricing, and operational support professionals throughout the Washington, DC area. Our expert solutions support business growth in the commercial and not-for-profit markets, including government contracting, technology, professional services, hospitality, real estate and more.

### About Cherry Bekaert

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