

Meeting Controllershship-level Needs for a Large Supplier Through Advisory and Resource Solutions



CLIENT

Government & Industrial
Chemical Supplier



INDUSTRY

Industrial
Manufacturing



OUR ROLE

CFO Advisory Services
Accounting Advisory Services
Recruiting & Staffing Services

A manufacturer and supplier of environmentally friendly chemical products for industrial and governmental agencies (the Supplier) engaged Cherry Bekaert's Accounting Advisory and Recruiting & Staffing Services to standardize month-end close processes and build long-term in-house financial leadership.

Complex Accounting Needs Without Controller Oversight

Large and sophisticated, the Supplier was navigating a period of transition following the end of its relationship with a prior outsourced accounting provider. While the Supplier maintained internal staff capable of handling day-to-day transaction processing, it lacked true controllershship-level expertise — particularly someone who understood debits and credits — to oversee the month-end close and manage more complex accounting areas.

As a result, leadership needed professional support to restore consistency and standardize the month-end close process while addressing a longer-term gap at the controller level.

Later in the engagement, leadership wanted to take a thoughtful approach to hiring a full-time controller. Finding the right individual required balancing technical accounting expertise, cultural alignment and close proximity to the Supplier's Texas location for periodic on-site support.

A Coordinated Advisory and Resource Solutions Strategy

Cherry Bekaert's CFO Advisory team was first engaged to step in as a fractional controllership solution, augmenting the Supplier's in house team while providing controller level oversight. The engagement was structured across multiple advisory efforts to both sustain current operations and prepare for a future in house transition.

One advisory team focused on executing and reviewing the month end close, developing account reconciliations, and supporting transactional accounting activities. A second advisory team worked in parallel to design and implement consistent month end close processes, including guidance around leases, debt and other complex accounting areas. Together, these efforts established a repeatable close framework that could be handed off to a permanent controller.

After approximately a year of advisory support, the Supplier indicated it was ready to bring the controllership function in house but needed help defining what the role should entail.

Working closely with Supplier leadership, the Advisory and Recruiting & Staffing teams:

- ▶ Clarified controller level responsibilities
- ▶ Aligned requirements around location, skill set and compensation
- ▶ Identified candidates who met both technical needs and the Supplier's value

Rather than pursuing an immediate direct hire, Cherry Bekaert recommended an interim to permanent approach, allowing the Company to evaluate fit while maintaining advisory oversight.

Operational Stability and a Permanent Controller

Following three candidate interviews, the Supplier selected an interim controller who utilized our recommended month-end close methodology and processes. After approximately three months, the Supplier converted the role to a full time, permanent controller position.

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Cherry Bekaert continued to serve as a second level reviewer during the transition, providing continuity and support as the controller became fully acclimated to the Supplier's processes and expectations.

Overall, the combined advisory and recruiting approach delivered meaningful operational improvements, including:

- ▶ A **reduction in the month end close** timeline from approximately **30 days to 10 days**
- ▶ Clearly defined, **repeatable close processes** transitioned successfully in house
- ▶ **Placement of a permanent controller** aligned with both technical requirements and Company values
- ▶ Ongoing advisory involvement to reinforce **consistency and quality**

The Value of One-firm Collaboration

This engagement highlights the strength of Cherry Bekaert's integrated service model and long standing client relationships. Built on previous years of trust through audit and tax engagements, the relationship naturally expanded when the Supplier sought a new accounting provider following the termination of its prior outsourced firm.

That foundation enabled seamless collaboration between internal Cherry Bekaert teams, facilitating a smooth handoff from interim controllership support to permanent placement. Working as one firm, Cherry Bekaert helped the Supplier transition with confidence, continuity and clarity.

For More Information, Contact:



Alex Wiley

Director, CFO Advisory Services
alex.wiley@cbh.com



Michael Bennet

Director, Recruiting & Staffing Services
mike.bennett@cbh.com

cbh.com



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