

CFO Advisory Solutions for a Global Enterprise



CLIENT

Tax and Immigration Startup

A global tax and immigration startup (the Company) collaborated with Cherry Bekaert to solve complex accounting and compliance challenges that hindered its ability to manage financial operations globally.



INDUSTRY

Professional Services

Post-acquisition Changes and Staffing Challenges

After the Company was acquired by a private equity firm, it transitioned to employing only client-facing personnel, leaving it without any back-office infrastructure. With a one-year transition services agreement in place, the Company faced a tight timeline to restructure global corporate support functions and systems, including [Salesforce](#) customer relationship management (CRM), financial platforms, human resource tools, expense and timesheet systems.



OUR ROLE

- ▶ Finance Modernization
- ▶ Change Management
- ▶ Tax, Local & Statutory Compliance
- ▶ ERP Implementation

Cherry Bekaert's [CFO Advisory](#) and [Digital Advisory](#) practices guided the Company through change management initiatives, finance modernization, and assisted with tax compliance, laying the foundation for scalable global growth.

Identifying Barriers to Growth

Fragmented systems and manual, labor-intensive processes made it difficult for the Company to maintain accurate financial records, comply with international rules and regulations, and maintain standardized reporting practices.

Operating in over 150 countries and territories, the Company faced complex accounting and compliance challenges, including:

- ▶ Accounting standards across jurisdictions
- ▶ Tax regulations with varying local requirements
- ▶ Currency conversions that impacted financial accuracy
- ▶ Workplace culture migration, which influenced operations and communication
- ▶ Data privacy requirements that demanded region-specific safeguards
- ▶ Financial statement reporting in local Generally Accepted Accounting Principles (GAAP) jurisdictions

These complexities required a strategic and scalable approach to global financial management.

Mobilizing Global Solutions

Cherry Bekaert's Advisory team mobilized a cross-functional initiative to guide the Company's transformation. Leveraging its strategic alliance within the Allinial Global network, Cherry Bekaert delivered tailored solutions to meet the Company's unique operational and compliance needs.

Implementing Modern Accounting

With no internal accounting staff in place, Cherry Bekaert provided [outsourced accounting solutions](#) in 12 countries. This support was critical during the Company's SAP implementation, which introduced a unified enterprise resource planning (ERP) system to manage accounting and finance processes for each country. Our professionals facilitated the migration of data from legacy systems to the new ERP and eliminated manual workflows, streamlined operations and removed manual accounting processes.

Initiating Project and Change Management

Cherry Bekaert led project management for the Company's SAP rollout, which involved coordinating contractors and internal stakeholders across geographies. The team captured and defined global business processes and developed a

comprehensive change management strategy, including communications and training plans. Tailored training packages supported end-to-end processes, including:

- ▶ Engagement to cash
- ▶ Procure to pay
- ▶ Record to report

Aligning Tax, Local and Statutory Reporting Requirements

Through the Allinial Global network, Cherry Bekaert engaged in-country specialists to assess and collect tax, local and statutory reporting requirements across more than 42 countries. These requirements were aggregated and delivered to the SAP implementation team to accurately configure the system. Additionally, our team supported statutory reporting and local audits in 12 countries, including the development of conversion templates to align local standards with U.S. GAAP.

Implementing Workforce Model Development

Cherry Bekaert conducted a comprehensive analysis of staffing needs across business units in 42+ countries. The resulting workforce model identified key processes, workload metrics and time estimates to determine full-time equivalent (FTE) staffing requirements for the Company's centralized finance office.

The collaborative effort has allowed the Company to build a scalable, compliant and globally integrated back-office infrastructure, positioning them for continued growth and operational excellence.

For More Information, Contact Us:



Chase Wright

Partner, CFO Advisory

cwright@cbh.com



Alex Wiley

Director, CFO Advisory

alex.wiley@cbh.com

About Cherry Bekaert

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