

# Operational Excellence in Retail SaaS



## CLIENT

PE-backed Retail SaaS  
Platform



## INDUSTRY

Software as a Service  
(SaaS)



## OUR ROLE

Outsourced Accounting  
Services

Cherry Bekaert collaborated with a private equity-backed SaaS platform to transform financial operations into a scalable, insight-driven infrastructure.

A software provider (the Company) that serves multi-unit restaurants, convenience stores and independent grocers across the U.S. was formed through the consolidation of several technology businesses, which created operational complexity.

The organization was required to manage multi-entity and multi-currency financial reporting, unify disconnected systems, and establish consistent visibility into recurring revenue and SaaS performance metrics.

At the same time, the private equity sponsor required timely, accurate reporting and clear insight into financial performance, placing additional pressure on the finance function to integrate quickly without sacrificing control or scalability.

## Navigating Disconnected Systems

Prior to engaging Cherry Bekaert, the organization faced several critical challenges, including:

- ▶ Financial reporting processes that were fragmented across multiple acquired entities
- ▶ Legacy systems were unable to support multi-entity and multi-currency requirements
- ▶ Complex and inconsistent revenue recognition processes
- ▶ Limited visibility into key SaaS metrics
- ▶ Aggressive post-close timelines created urgency for rapid integration and stabilization

## Implementing a Tailored Solution

Cherry Bekaert's Outsourced Accounting Services team deployed a multi-entity, multi-currency Sage Intacct accounting system that was integrated with multiple instances of Maxio — a billing and financial operations platform — to better manage revenue, metrics and retention across various acquisitions.

Once the platform was designed, the Cherry Bekaert team created processes to streamline revenue recognition and deliver real-time visibility into SaaS key performance indicators (KPIs), such as annual recurring revenue (ARR), customer acquisition cost (CAC), churn and retention. Recognizing the urgency of private equity timelines, Cherry Bekaert designed and executed an accelerated implementation approach to bring the solution live within 60 days post-close while maintaining accuracy and control.

Throughout this process, the team collaborated with the Company's chief financial officer (CFO) and controller to strengthen core accounting operations, improve reporting discipline, and design a finance function capable of supporting ongoing growth and acquisition activity.

Our portfolio is expanding and there may be future needs for projects like ours across both new and existing platforms. I've truly enjoyed working with the [Cherry Bekaert] team and fully expect this to continue as we move into the accounting operations side."

- CFO, The Company

## Achieving Measurable Improvements

Our flexible, client-focused approach and ability to support rapid transformation provided leadership with improved transparency and control, which has increased confidence in financial data and improved operational efficiency across the organization. With scalable systems now in place, the Company is well positioned for continued growth and expansion.

The engagement delivered measurable improvements across financial operations and reporting, including:

- ▶ An accelerated and more reliable financial close process
- ▶ Consolidated reporting across all entities
- ▶ Seamless integration of multiple acquisitions into a unified system
- ▶ Enhanced visibility into SaaS performance metrics
- ▶ A finance function repositioned as a strategic enabler of growth

Cherry Bekaert's Outsourced Accounting team has continued to work with the Company after implementation by providing core accounting support across the new platform, which has allowed finance leaders to shift their focus toward strategic initiatives while reducing accounting overhead.

## For More Information, Contact Us:



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## About Cherry Bekaert

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