

# Unifying Finance for Multi-entity PE Firm

Imagine juggling five different accounting systems, scattered billing platforms and mismatched reports all at once. That was the reality for one private equity (PE) portfolio client.

In today's competitive market, inefficiency comes at a cost beyond just money. Realizing the need to act quickly, the firm engaged Cherry Bekaert. However, what they really needed was more than a patch fix; they required a complete financial transformation.

## Client Overview

As a leading PE firm operating in the financial solutions sector within professional services, they aimed to unify all services under a single, streamlined structure. Each entity operated with its own accounting systems, billing platforms and reporting structures. The firm envisioned a unified financial ecosystem that could provide transparency, efficiency and scalability.

## Navigating Siloed, Inefficient Systems

Consolidating these diverse entities into a single, seamless financial system was no small feat. Beyond system integration, the acquired companies needed relief from day-to-day billing and operational tasks. The PE firm wanted a solution that would:

- ▶ Merge multiple accounting systems into one
- ▶ Standardize billing processes
- ▶ Build an internal team for ongoing financial management

## Building a Finance Transformation Roadmap

We worked closely with the client to design a transformation roadmap that addressed every pain point, including the following:

### 1. System Consolidation and Integration

Migrated all acquired companies from QuickBooks and other single-entity systems into a multi-stage integrated platform. This created a unified financial backbone for the entire portfolio. The integration also increased data consistency across entities, reduced errors and enabled real-time visibility into financial performance.

### 2. Unified Billing Platform

Consolidated multiple billing systems into a single centralized platform, streamlining invoicing and improving accuracy in financial reporting. This integration accelerated billing cycles by 30%, delivering faster cash flow and higher client satisfaction.

### 3. Building an Internal Accounting Team

Established a skilled internal accounting team to manage daily operations, freeing the acquired companies to focus on growth. We also implemented structured onboarding so the team could maintain compliance and scalability from day one.

#### 4. Financial Reporting and Forecasting Model

Developed a robust reporting and forecasting framework to consolidate results across entities and provide actionable insights for future planning. The model enabled scenario-based forecasting, helping leadership make proactive decisions during market fluctuations.

“We are pleased to welcome talented and experienced partners who have successfully built their business from the ground up and share our vision of creating a leading provider in the industry,” said the firm.

#### Results and Impact

The transformation delivered measurable results instantly, leaving a significant impact on the client.

- ▶ **Operational Efficiency:** Reduced redundancies and improved workflows
- ▶ **Streamlined Processes:** Standardized billing and reporting across all entities
- ▶ **Accurate Forecasting:** Enabled data-driven decisions for growth
- ▶ **Successful Audit:** Achieved compliance and transparency
- ▶ **Ongoing Value Creation:** Positioned the portfolio for long-term success

#### Conclusion

This collaboration marked a turning point for the client. Through strategic integration and team building, Cherry Bekaert helped consolidate multiple financial systems, establish a dependable internal team, and implement forecasting tools that support future growth. The result? A unified financial ecosystem that drives transparency and efficiency. Additionally, the long-term value for all stakeholders is an added advantage.

#### Your Guide Forward

Cherry Bekaert helps businesses simplify finance and make smarter decisions. We provide solutions in strategy, analytics and operations to keep your organization moving forward. Our goal is to turn complex financial challenges into clear, actionable plans that support scaling at every stage.

No matter what your size or industry, you deserve professional financial guidance. Our experienced team creates custom strategies designed to fit your goals and overcome unique challenges.

From early-stage startups to established enterprises, we focus on practical, scalable solutions that drive long-term success. Working side by side with your team, we align financial planning with your vision so you can scale confidently.

#### For More Information, Contact:



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#### About Cherry Bekaert

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