

# CASE STUDY: TRANSITION OF A KEY EMPLOYEE

## TRANSPORTATION COMPANY EXPERIENCES SEAMLESS CFO TRANSITION

### *Asking the Hard Questions*

When the CFO of a successful family-owned transportation company decided it was time to retire after 30 years with the company, the family found themselves needing to replace this key member of their management team. To add to the complexity and time sensitivity of the situation, the company was in the process of acquiring a competitor. How could this company best manage the transition?

### *Giving Honest Answers*

EKS&H moved quickly to interview the current president and founder, along with other key members of the executive team to define the profile of a new CFO. Because the company had existing relationships with the audit and tax service areas of our firm, we were able to gain a comprehensive understanding of the company and best assess what type of candidate would succeed in the position. We developed a candidate profile and job description, recruited qualified professionals and interviewed potential candidates to evaluate their technical experience and qualifications, as well as cultural fit. All the while, we worked with the departing CFO to ensure a smooth transition.

### *Providing Actionable Solutions*

We placed a new CFO at the company and facilitated a seamless transition. By utilizing EKS&H's resources to manage the recruitment process, the management team was able to remain focused on running the business and completing the acquisition.



Talk to an EKS&H Business Consultant today: **303.740.9400**

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