

Addison Group Steadies PE-Backed SaaS Company Through Unexpected FP&A Leadership Gap



A private equity-backed SaaS company faced an unexpected senior-level resignation as a new CFO was onboarding and weeks before a critical board meeting.

Challenge

For a \$500M private equity-backed SaaS company with \$400M in Annual Revenue Return, finance leadership continuity isn't optional, it's foundational to maintaining sponsor confidence and operational visibility. When their VP of FP&A resigned unexpectedly, the timing could not have been worse.

A new CFO was still onboarding. The board meeting was weeks away. And the institutional knowledge that mattered most, forecasting logic, board narratives, and KPI models, had walked out the door with the departing leader.

Without that knowledge in-house, the FP&A team lacked structure, and executive leadership lacked visibility in the numbers driving the business. The risks were significant: missed board deliverables, eroded PE sponsor confidence, and a finance function operating without a clear point of accountability during a high-stakes transition.

Solutions

Addison Group understood the urgency and placed an interim VP of FP&A. The candidate came from a publicly traded SaaS company of similar scale with complex revenue streams, with experience working in NetSuite, Adaptive, and Salesforce, the same stack the client operated in.

The match was deliberate: the company needed someone who could walk into an active board cycle and operate without extensive onboarding.

Scoped initially as a three-month engagement, the consultant was extended to nine months. During their tenure they rebuilt forecasting and reestablished the planning cadence, delivered board-ready reporting, mentored team members to build durability into the function, and worked directly with the incoming CFO through the transition. The engagement closed with a clean handoff to a permanent VP of FP&A.

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The Addison Difference

We know that great teams start with great people.

That means we focus on quality, not quotas. It means that we're laser-focused on seeing candidates beyond their resumes to understand their goals and make sure they align with your mission. And it means working with you to get detailed insights into your teams so we can find people who fit, not just who's available.

No one **gets talent** like Addison Group.®

About Addison Group

Addison Group delivers specialized talent solutions and consulting services across finance & accounting, IT, healthcare, HR, and administrative functions. Our people-first approach helps organizations build high-performing teams, when and where they need them.

A full range of services

- Contract
- Contract-to-hire
- Permanent placements
- Executive search

Accolades



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