

FINANCIAL SERVICES | INVESTMENT MANAGEMENT | FINANCE AND ACCOUNTING

An investment management firm was standing up a consolidations function and replacing 2 systems at the same time

Build a department, run 2 concurrent system implementations, and do the consolidations work personally until there is a team. We filled it in 35 days.

INDUSTRY	FUNCTION	ROLE	MARKET	ENGAGEMENT	TIME TO PLACEMENT
Financial services. Investment management	Finance and accounting	Consolidations Accounting Director	New York metro	Retained executive search	35 days

THE SITUATION

An investment management firm in the New York metro area needed a Consolidations Accounting Director.

The role came with 3 jobs running at once: build a department that did not exist, manage concurrent general ledger and financial reporting implementations, and do the consolidation work personally until there was a team to hand it to.

WHAT MADE IT HARD

- **Building and doing.** Directors who can build a function usually stop being hands-on. This role needed both, indefinitely.
- **2 implementations at once.** General ledger and financial reporting, concurrent, on top of a live close.
- **No team yet.** Year 1 would be solo, and candidates needed to understand that before they interviewed.

HOW WE RAN THE SEARCH

- 1 **Searched the NY metro consolidations market.** Professionals with implementation experience at organizations of similar complexity.
- 2 **Described the job honestly.** Every conversation covered the part where the Director does the work themselves. That filtered the field faster than any screening question.
- 3 **Submitted 6, all briefed.** Each candidate understood the dual implementations before their first interview.
- 4 **Supported both sides through every round.** Preparation sessions before interviews, real-time feedback after them, in both directions.

THE OUTCOME

Placed in 35 days.

The Director took both implementations and the consolidation close, and is running the department build.

BY THE NUMBERS

35

DAYS TO PLACEMENT

6

CANDIDATES SUBMITTED

2

CONCURRENT IMPLEMENTATIONS

IN THEIR WORDS

"I love the position and am providing pivotal guidance to the organization as they implement and build out their General Ledger and Financial Reporting systems."

THE PLACED CANDIDATE, CONSOLIDATIONS
ACCOUNTING DIRECTOR

WHY IT MATTERS

The technical requirement was easy to write down. What made this search work was being straight with candidates about the hands-on reality, so the person who accepted knew exactly what they were walking into.

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