



Filling the Void with an Experienced Finance Leader

CFO | Full Time | Commercial HVAC

The Client

A privately owned \$50-100M revenue business (The Client) in the commercial HVAC sector. Second-generation management, looking to strategically grow the business.

The Challenge

The Client has operated, over the past number of years, with a fractional CFO along with various directors and VPs of finance. The Client experienced many different finance leaders over the years but never found the right one for their business. The CEO, in fact, needed to step into what should have been *traditional* CFO issues on many occasions. They now had a strong need for strategic financial support to remove the burden on themselves and fill the gap in their senior leadership team. On top of that—due to a skills gap at the level below—the new leader would need to address structural team issues in a hands-on way, before being able to focus on strategic growth initiatives.

The Solution

GlassRatner was retained to identify a true finance leader with both broad bandwidth across operational and strategic issues, and the depth and hands-on skill and willingness to address and resolve technical issues.

Through an exhaustive search, we presented a short list of four candidates, from a variety of

backgrounds and industries. The Client selected two of the four to interview and, based on these meetings and the analysis of the company needs, was able to further articulate what was important in the job specification. We presented a second short list of three candidates, and the Client interviewed all three. One of these candidates emerged as a clear front-runner and after completing the interview process—including meeting other stakeholders and executives—was hired.

The Outcome

This search was a great example of *fit* surpassing all other requirements. The selected candidate was not from the HVAC industry, or anything aligned to that industry. However, the CEO established a great rapport with the selected candidate in the first meeting, which only grew as the process progressed.

Just two months into the role, the CEO reported that the new CFO “is very engaged and taking on all that I had hoped and dreamed of.”

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