

CASE STUDY

CLEARPOINT FINANCIAL SOLUTIONS IS AN EDUCATION-FOCUSED AGENCY AND PART OF THE LARGEST NONPROFIT, FULL-SERVICE CREDIT COUNSELING AGENCY IN THE UNITED STATES. \$27M REVENUE, 30 LOCATIONS, 385 EMPLOYEES, 200,000 CLIENTS SERVED

Janice was formerly the Chief Financial Officer of Consumer Credit Counseling Services of Greater Atlanta. We engaged her several years later to provide strategic CFO Advisory Level Support to our new organization, Clearpoint Financial Solutions. In that role, Janice provided strategic oversight & direction to our finance team, recommended improvements to the department structure, and acted as an adviser to our Executive Leadership Team. Janice brought keen insights that allowed us to clearly identify

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and evaluate a number of strategic options related to the future of our agency. Her ability to develop a very concise, high-level picture of the organization, through a deep analysis of the detail, is truly extraordinary. Janice has the mindset of an entrepreneur and is passionate about helping businesses succeed. I would highly recommend her services to any CEO who needs a strategic partner to help streamline

costs, ensure appropriate controls, and accelerate growth.



Michelle Jones
Chief Development Officer, Money Management International & Executive Director, Clearpoint division

CHALLENGE

Restructure the finance function, consolidate systems, identify new agency programs, perform scenario planning to model future agency options.

INTERVENTION

Engaged to function as an Interim CFO, Janice led the restructuring of the finance function to drive accountability and the consolidation of the internal financial systems reducing the closing cycle from three weeks to four days. Janice collaborated with the leadership team to identify new programs to drive revenue and she developed scenario plans to evaluate strategic options related to the future of the agency.

OUTCOME

The company was merged by Money Management International in 2017. Company management retained a stake in the business, aligning their interests with MMI.