

CASE STUDY



List Partners provides sales intelligence content for business development professionals who target national advertisers and their agencies in the U.S. and U.K. through their signature product, Winmo.

"We turned all our accounting and finance operations over to TechCXO. Not only did the TechCXO team provide excellent service, they were an invaluable strategic and operational advisor throughout our path to a controlled buyout transaction."



- **Dave Currie**, CEO,
List Partners

CHALLENGE

- Need for multi-level finance/accounting leadership and expertise but List Partners' ownership did not foresee the workload to support the cost of full time resources.
- Need for on demand operational and strategic finance and accounting expertise through buy side and sell side M&A activity.

INTERVENTION

Engaged TechCXO in 2015 including a team of 3 distinct resources acting as the fractional CFO, VP Finance and Controller, respectively. As a fully outsourced finance/accounting department, TechCXO implemented its best practice processes, methodologies and systems to support List Partners' multi-year growth at a fraction of the cost of full time management employees.

TechCXO led all internal, tactical and strategic, finance/accounting operations including buy side and sell side M&A activity.

OUTCOME

Majority control of List Partners was acquired in 2018 by Northlane Capital Partners.

Form more information, contact Jason Scherr, TechCXO Partner at jason.scherr@techcxo.com