

CFO Roundtable

Key Takeaways

New York | December 2025



Key CFO Strategies for Scaling PE-backed Businesses via Acquisitions

Kyle Johnson, CFO of Quilt Software opened the discussion by challenging a common assumption in M&A: that value is created at close. Instead, he emphasized that integration is where strategy becomes reality. Drawing on experience in high-frequency acquisition environments, he shared how disciplined execution across people, systems, and data enables CFOs to scale without compounding complexity. This framing set the tone for a thoughtful and practical discussion among attendees. Key takeaways are summarized below:

1 Over-Invest in Systems Early – "Hat on a Hat" Pays Off

One of the clearest messages from the discussion was that early investment in core systems is not overkill, it is insurance. Kyle emphasized that fragmented ERPs, billing platforms, and reporting tools quickly become bottlenecks as acquisition velocity increases. While these investments can feel premature at smaller scale, they prevent technical and operational debt from compounding over time. In high-frequency M&A environments, strong systems enable speed, accuracy, and confidence, rather than forcing teams to rely on manual workarounds as complexity grows.

2 Post-Acquisition Success Starts with People Integration

The conversation underscored that integration challenges are often people challenges before they are technical ones. Acquired teams, frequently founder-led and engineering-heavy, need to be thoughtfully folded into a single operating model early. Clear role definition, aligned expectations, and early assessment of fit help preserve institutional knowledge while maintaining execution pace. Participants agreed that successful acquirers focus on integrating people quickly so teams can operate cohesively rather than as parallel organizations competing for attention and resources.

3 ICP Discipline Prevents a "Grab Bag" of Businesses

A key theme in the discussion was the importance of acquiring with a clear customer profile in mind. Without an intentional ICP strategy, acquisitions can quickly become a collection of disconnected businesses with fragmented go-to-market motions. Aligning acquisitions around a common ICP enables shared sales, marketing, pricing, and customer success strategies across the portfolio. This focus reduces complexity, accelerates integration, and makes value creation repeatable rather than bespoke with each new acquisition.

4 Hire for M&A Experience Upfront with Clear Ownership

The discussion highlighted that repeatable M&A requires leaders who have been through integrations before. Hiring for prior M&A experience, particularly across finance, operations, and go-to-market functions, helps organizations avoid learning costly lessons in real time. Clear ownership and decision rights are equally critical. When accountability is explicit and finance plays a central coordinating role, integrations move faster, cross-functional alignment improves, and momentum is sustained through the most complex post-close periods.

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Successful Integrations Follow a Clear Day 1 / 30 / 60 / 90 Sequence

Pre-Close | Integration Readiness:

A key takeaway from the discussion was that successful integrations are often determined before a deal ever closes. Rather than treating diligence as a validation exercise alone, the pre-close period should be used to design the integration itself. When strategy, data, ownership, and value creation priorities are defined upfront, organizations can move immediately post-close.

Key pre-close priorities should include:

- Confirm acquisition thesis and ICP alignment
- Validate product-market fit and customer durability
- Identify primary value creation levers (pricing, GTM, payments, ops)
- Build deal model using the same structure as the operating model
- Align accounts, KPIs, and reporting definitions

Outcome: Integration begins immediately at close, with no surprises and no loss of momentum.

Post-Close | Day 1–30: Establish Control and Gain Clarity

The first 30 days sets the tone for the entire integration. This period prioritizes rapid stabilization, clear ownership, and bringing the acquired business onto shared systems and data so teams can execute confidently without delay or rework.

Day 1 | Establish Control

Goal: Eliminate ambiguity and parallel operations.

- Integration command center activated
- Clear ownership across Finance, Ops, GTM, CX
- Financial controls enforced (cash, AP/AR, reporting baselines)
- Immediate access to financial, CRM, billing, and payments systems
- Hard cutover to core platforms; no shadow systems

Outcome: One operating environment from Day 1

Day 30 | Stabilize & Get Complete Clarity

Goal: Trust the data before accelerating growth.

- Unified CRM live with complete customer records
- First month-end close on unified systems
- Core KPI dashboards operational and reliable
- Historical customer and revenue data mapped for continuity
- Early GTM activity launched (pricing, ICP tuning)

Outcome: Reliable reporting and operational visibility.

Post-Close | Day 60–90: Acceleration Value Creation and Scale

By Day 60, the focus shifts from stabilization to acceleration. With systems, data, and ownership in place, teams can begin converting integration progress into measurable performance gains. This phase centers on activating value creation levers, refining go-to-market execution, and ensuring the business is operating as a single, scalable platform rather than a collection of recently acquired assets.

Day 60 | Accelerate Value Creation

Goal: Turn integration into measurable performance lift.

- Primary value levers activated (pricing, payments, upsell, migration)
- Customer segmentation prioritized by economics and readiness
- Cross-sell and upsell paths identified using usage data
- Product and feature gaps assessed for retention and growth

Outcome: Value creation underway, not theoretical.

Day 90 | Fully Integrated & Ready to Scale

Goal: Complete integration and prepare for the next acquisition.

- Unified ERP, CRM, billing, payments, and data warehouse
- Billing migration completed without disruption
- Harmonized pricing and packaging across the portfolio
- Fully activated GTM engine operating on shared data
- Integration process repeatable for the next deal

Outcome: The business operates as one—and is ready to do it again.



“The best time to invest in systems is too early. And the next best time is immediately, like, right now.

Without the upfront investment in the systems... if you’re operating in Excel exclusively, it’s going to be awfully difficult to make these things successful.”

Kyle Johnson, CFO

Quilt

Jim O'Neill led a practical discussion on the current state of AI in finance. The conversation highlighted three realities: AI in finance remains supervised, data context is the primary constraint, and progress depends on secure system connectivity. FinQore was discussed as addressing these challenges by structuring finance data into governed cubes, embedding business definitions and context, and enabling AI to operate within controlled, human-validated workflows.

AI in Finance Is Powerful, but Still Requires Human Oversight

AI can now handle meaningful analytical legwork, but finance automation remains supervised. Jim emphasized that while models can surface insights and draft outputs, human judgment is still required for accuracy, accountability, and board-level reporting. In practice, AI works best today as an assistant rather than a fully autonomous decision-maker.

The Real Constraint Is Data Context, Not Model Intelligence

The discussion highlighted that AI struggles in finance not because models are weak, but because data lacks structure and shared definitions. Real progress depends on organizing, contextualizing, and streaming data in a way AI can reliably interpret.

Progress Is Shifting Toward Connectivity and Practical Infrastructure

Rather than autonomous agents, momentum is building around better system connectivity. MCP-style connectors were discussed as a practical way to link AI models with corporate systems securely. These approaches enable useful workflows while preserving governance, with private or hosted models emerging as options for security-conscious organizations.

LIVE DEMO* AI Use Cases For Finance

AI-Ready Data Foundation

Jim demonstrated how FinQore generates clean, reconciled, and deeply segmented revenue and customer data, creating a trusted foundation that enables accurate, AI-powered FP&A analysis.

“Saturday Special” Driver Analysis and MD&A Drafting

During the live demo, FinQore’s AI Analyst used this structured data to identify key performance drivers and generate first-pass MD&A narratives, accelerating insight generation while keeping finance teams in control of interpretation.

Forecasting and Scenario Modeling with Human Oversight

Leveraging FinQore’s historical cubes, the AI Analyst produced multi-scenario forecasts with provision for finance team to adjust core drivers.

Benchmarking and Competitive Analysis

The AI Analyst combined internal data with external benchmarks to surface anomalies and peer comparisons in real time for competitive analysis.

Transform Finance with Always-Ready Data and AI.

Navigate 2026 with FinQore — delivering real-time revenue, customer, and product usage intelligence enhanced by AI-powered insights that scale with your evolving business needs.

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Notable Quotes From The Roundtable Discussions

Scaling Via Acquisitions | Systems and Operating Foundation

“It was absolute overkill for a \$10 million ARR business... it was a pain... to build out and maintain... [but] I wouldn’t have done it any other way at this stage.”

Scaling Via Acquisitions | Finance as the integration quarterback

“The reason we put it on the finance team is... [they] really understand the data... [they’re] the centralized nervous system within the company.”

“[The integration PM] sits on our finance team. They’re responsible for the coordination [across] each of the functions.”

“We should be operating these businesses as though we’ve owned them for the past three years, not that we just started [owning] them.”

“We’re not following the process blindly... there are reasons you can deviate outside of the playbook.”

Scaling Via Acquisitions | Integration discipline and the 90-day standard

“There is nothing that we acquire that sits out of our systems at any point.”

“There were a few times early on where we said, ‘This isn’t big enough to integrate’... [and] there’s a lot of regret when we went down that path.”

On the Reality of AI in Finance

“AI can do a lot of the work, but finance is still a human-in-the-loop function. You don’t hit send to the board without checking the numbers.”

“The models aren’t the problem. The lack of context in finance data is.”

“If your data isn’t structured and reconciled, AI can’t help you — no matter how good the model is.”

“Most finance teams spend more time explaining their data to AI than actually analyzing it.”

“The real work in AI for finance isn’t model selection — it’s building the data foundation those models can actually understand.”