

## About the Company

Our client is a logistics company based in the Ontario/Rancho Cucamonga area. They are an established company, with multiple locations, and have a superb track record of consistent, solid growth. They provide premier logistics solutions to a varied customer base.

## Position Summary

The Controller position reports to the Executive Vice President and will work closely with the senior leadership team and other company leaders, providing oversight of all finance, accounting and reporting activities. They will lead all day-to-day finance operations and supervise a team of staff members including functional responsibility for accounting, including bank reconciliations, cash reports and disbursements cycles, purchases, sales, payroll transaction cycles, fixed asset sub-ledger maintenance, budgeting and forecasting, and cost efficiency administration. They will coordinate tax planning with the CPA firm.

## Key Deliverables

The most significant accomplishment will be the successful establishment of a respected and effective controller functions that will partner with the senior management team, to achieve the company's business objectives. To achieve this, the sub-objectives include and are not limited to:

1. Immediately upon joining the company, start building trust with the workforce to assimilate into the company culture. In the first two weeks meet with all members of the team across the company to understand the following: team members and their roles, the company's structure, the business units and their contributions, internal processes, and customers. Spend time in each office to understand the business better.
2. Within 30 days, understand the administration and controller position responsibilities; who are the stakeholders and their roles; company resources, goals, and objectives. Assume day to day management of the controller activities.
  - a. Work closely with department leaders and their staffs, not only to educate them regarding finance and accounting procedures but also to explore how the finance function can support their department operations. Train/coach the business unit managers to understand their financial reports at a deeper level and how they can improve profits.
  - b. Build relationships with outside service providers including the CPA firm, bank, commercial insurance broker, and employee benefits broker.
3. During the first 60 days, conduct a thorough SWOT analysis of the controller functions to (a) ensure compliance and correct any issues as needed; (b) identify priorities;
4. Within 90 days, build strong relationships with the branch manager base and know their businesses, and the metrics needed for tracking their production, and success.
  - a. Capitalizing on the manager's local expertise, create the metrics reporting tools by designing a data/finance model that capture's the company's needed information, in order to compile all the data into singular reports for specific locations, and rolled up to a complete Corporate report with the metrics from all the business divisions.
  - b. Figure out the best ways to do cost accounting, create pricing templates, and run cross-sectioned reports to show the profit by customer, lane, line, location, etc.

5. Within 120 days, evaluate the current staff and develop a performance management plan and a 90-day plan for each person on their team to support the achievement of the department goals and to play to each team member's strengths.
  - a. Prepare quarterly written goals for each team member and evaluate staff accordingly. Establish or understand performance metrics and goals, allocate resources and evaluate the progress of each team member.
  - b. Continue to foster a positive working culture and collaborative team environment.
6. Within 180 days, understand the company's pricing and refine the templates that can be used for job costing purposes.
  - a. Work with the sales organization to identify questions they can ask on sales calls, especially to help customers compare apples to apples when comparing vendors.
7. Over the first year, work with the Company leaders to identify and implement ways to apply the new technology and technical processes to enhance the accounting procedures and processes.
  - a. Participate as the Subject Matter Expert (SME) in accounting areas during the company's migrations from Oracle to a new system geared towards the transportation and logistics industry.
  - b. Together with the head of IT, act as the project co-manager for the system integration/change, to manage the software conversion process and getting a handle on the reporting needed to produce better costing and assist management in developing a pricing matrix.

### **Preferred Attributes**

This is an extraordinary opportunity for someone with seven to ten years of accounting and finance experience, ideally beginning in accounting and audit, followed by experience gathering, evaluating, presenting and reporting financial information to executive teams and stakeholders. The controller candidate should have a Bachelor's degree in accounting or business administration and CPA.

- Knowledge of finance, accounting, budgeting, and cost control principles including Generally Accepted Accounting Principles. Knowledge of automated financial and accounting reporting systems, cost accounting, fixed assets, and customer billing.
- Knowledge of federal and state financial regulations. Ability to analyze financial data and prepare financial reports, statements, and projections. Working knowledge of short and long term budgeting and forecasting, rolling budgets, and product-line profitability analysis (aka operating ratios).
- Ability to motivate teams to produce quality materials within tight timeframes and simultaneously manage several projects.
- Ability to establish credibility and be decisive, but able to recognize and support the company leaders' preferences and priorities.
- A leadership style that balances a positive, collaborative, coaching style with maintaining high standards and expectations, and professional written and verbal communication and interpersonal skills.
- Solid and exceptional character, with business and personal integrity.
- Able to look ahead and provide forward-looking projections and stay on top of trends that will support the management team.
- Needs to be able to modify and assess changes in processes where needed, whether in operations, new service lines, locations, etc.

**Travel**

Travel will be minimal.

**Compensation**

The company offers a base salary in the low six-figures per year. In addition, the company offers benefits including medical, dental, vision, 401(k) plan, vacation pay, and holiday pay.

**Executive Search Consultant**

Ethos Human Capital Solutions provides retained search services, training, and human resources consulting for organizations throughout Southern California, including for profit and not for profit.

To apply for this position, please contact our Recruiting Manager, Kimberly Kenner, at Kimberly@EthosHCS.com or (714)-203-1171.