5 WAYS Interim Leaders Accelerate Performance in Finance

Delivering stability, discipline, and execution at moments that matter most

WittKieffer

2026

Finance Under Pressure

Finance functions in investor-backed and publicly traded healthcare and life sciences organizations are under constant pressure to deliver clarity, control, and insight. Leadership transitions, ownership shifts, and accelerated growth expose gaps in reporting, operations, and systems, requiring finance to step up quickly as a critical partner to investors in performance management and value assurance. As hold periods extend and exit timelines become less predictable, the finance function must shift from exit preparation to sustained operational value creation, delivering dependable performance.

Interim CFOs, on-demand finance consultants, and fractional finance executives play critical roles in this setting. Combining hands-on execution with experience across comparable organizations, they help organizations stabilize, implement practical improvements, and establish the structures needed to support performance — at the pace and with the capital discipline investors require.

When Interim Finance Leadership Becomes Critical

- Finance functional buildouts and capability development
- Increased investor expectations or performance resets
- Rapid growth or operational complexity outpacing finance capabilities
- Fragmented systems and limited data visibility
- Need to improve financial discipline
- Transaction activity or capital events

A strong finance function is essential to maintaining control, ensuring transparency, meeting investor expectations, and enabling sustained value creation.

From STABILIZATION to value REALIZATION

Interim finance leaders create the most impact when they move the function forward across a clear set of priorities: from gaining control to enabling performance to delivering value.

STABILIZE	DEFINE	BUILD	RUN	DELIVER
Continuity & Control	*Reporting & Governance*	*Systems & Data*	*Finance Operations*	*Transactions & Value*

01 Establish continuity and control during periods of change

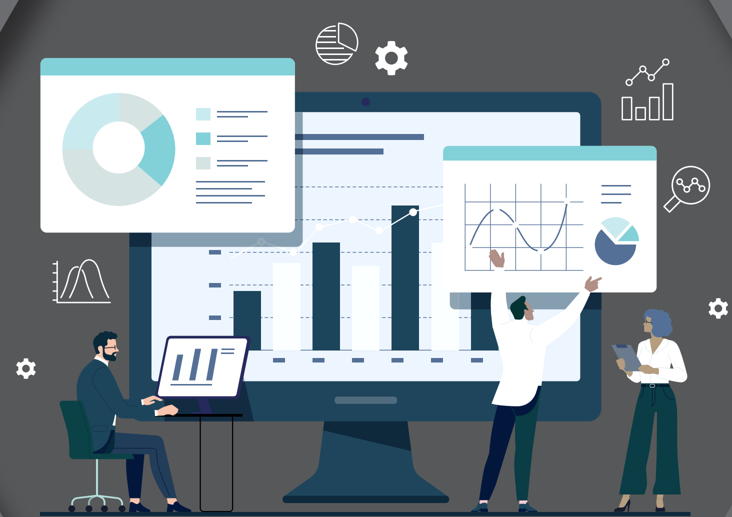
02 Establish investor-grade reporting and financial discipline

03 Implement scalable finance infrastructure and AI-ready data foundations

04 Strengthen finance operations at scale

05 Enable transactions and capital events

The Value of Interim Finance Leadership



Interim finance leaders create impact where requirements for performance and growth exceed existing capabilities. They step into moments of transition or disruption to bring immediate direction, discipline, and forward momentum. With no ramp-up time, they focus on what matters most: stabilizing the function, establishing credibility, and putting structure around how the business is measured and managed. Their value lies not simply in providing coverage, but in applying pattern recognition from comparable situations to solve discrete, high-value problems.

Beyond stabilization, interim leaders build the foundations that allow finance to operate with rigor and consistency by establishing reporting standards, strengthening operations, implementing modern systems, and enabling the business to navigate complexity with confidence. In doing so, they help organizations move from reactive correction to sustained performance and value creation.

01 Establish continuity and control during periods of change

During periods of transition and change, finance must first establish control before it can transform. Interim leaders focus on stabilizing the function quickly: ensuring continuity, reducing risk, and rebuilding confidence across the organization.

- **Rapidly assess financial risks and priorities,** including liquidity, reporting gaps, and control weaknesses
- **Stabilize core close processes and financial reporting execution** to ensure timely, reliable financial information
- **Establish basic financial controls and oversight** to reduce risk and reinforce discipline
- **Create immediate visibility into cash and performance** to enable informed decisions under pressure
- **Provide immediate leadership continuity** during restructuring, organizational change, and leadership transitions
- **Focus the finance team on critical priorities,** aligning effort with the most urgent business needs

Ensures control and credibility at moments of highest risk, stabilizing the business and maintaining confidence with leadership, board, and investors.

02 Establish investor-grade reporting and financial discipline

Finance must define how the business is measured, communicated, and governed. Interim leaders translate the organization's financial performance into an investor-ready finance playbook, establishing clear metrics, consistent reporting, and the structures required to meet investor expectations.

- **Define key performance indicators and success measures** aligned with the value creation plan, investor expectations, and business priorities
- **Establish consistent reporting frameworks and cadence,** including monthly, quarterly, and board-level reporting
- **Standardize definitions, data sources, and methodologies** to ensure accuracy and comparability
- **Develop clear financial narratives, management reporting, and board materials** that translate performance into actionable insights and decisions
- **Clarify governance structures and decision rights** ensuring alignment between finance, leadership, and investors
- **Set expectations for performance review and accountability,** introducing discipline into how results are assessed and managed

Creates a single, credible source of truth, enabling aligned decision-making, improving transparency, and meeting investor expectations.

03 Implement scalable finance infrastructure and AI-ready data foundations

Interim leaders focus on modernizing infrastructure, ensuring that reporting, analysis, and operations are supported by reliable, connected platforms. For AI-enabled finance in particular, they help bridge the gap between ambition and execution by grounding use cases in data quality, ownership, and practical implementation.

- **Assess current systems and data architecture,** identifying gaps that limit visibility, operational effectiveness, or reliability
- **Select and implement core finance systems** (e.g., ERP, consolidation, planning tools) aligned with business needs
- **Integrate disparate systems and data sources,** creating a more unified and consistent view of performance
- **Establish data governance and quality standards** to ensure accuracy, consistency, and trust in financial information
- **Build AI-ready data foundations,** enabling advanced analytics and more timely, insight-driven decision support
- **Improve access to real-time or near-real-time data** to support effective reporting and analysis

Enables reliable, scalable, and insight-driven finance, reducing complexity, improving visibility, and supporting better decision-making at speed.

04 Strengthen finance operations at scale

Finance must execute with consistency, discipline, and efficiency. Interim leaders focus on strengthening core finance operations, ensuring that processes run reliably at scale and provide a solid backbone for the organization.

- **Improve close processes and strengthen accounting operations,** increasing speed, accuracy, and transparency
- **Strengthen financial controls and audit readiness,** reducing risk and ensuring compliance
- **Optimize cash conversion and working capital management,** improving liquidity and financial flexibility
- **Establish and enhance treasury operations,** including cash visibility and liquidity management
- **Streamline transaction processing and core finance workflows,** reducing manual effort and improving efficiency
- **Ensure consistency and discipline in day-to-day finance execution,** reinforcing standards across the organization

Drives consistent, disciplined execution, improving accuracy, liquidity, and operational efficiency while reducing risk across the finance function.

05 Enable transactions and capital events

During transactions, ownership changes, and capital events, finance must perform with precision, speed, and credibility. Interim leaders play a central role in preparing for and supporting execution, ensuring that financial information, processes, and teams are ready for scrutiny and action.

- **Prepare the organization for transactions and capital events,** including due diligence, investor engagement, and readiness assessments
- **Ensure financial data integrity and transparency,** enabling confidence in reporting and valuation
- **Support M&A execution and integration,** aligning financial structures, processes, and reporting across entities
- **Develop and refine transaction materials,** including EBITDA bridges, synergy models, working capital analyses, and investor-facing deliverables
- **Coordinate cross-functional efforts,** ensuring alignment across finance, leadership, advisors, and external stakeholders
- **Maintain operational continuity during transactions,** balancing execution demands with ongoing business performance

Enables successful execution of transactions and capital events, reducing risk, accelerating timelines, and maximizing value realization.

CASE STUDY 01

Scaling the Finance Function to Support Rapid Growth

THE SITUATION

An expanding pharmacy compounding and distribution company was doubling revenue year over year and approaching hundreds of millions in revenue. As the organization scaled, leadership recognized the need for a more mature finance function capable of supporting expansion, strengthening operations, and preparing the business for future capital initiatives.

The company sought an experienced interim CFO to provide finance leadership, oversee day-to-day operations, and help build the capabilities needed for the next phase of growth.

THE INTERIM SOLUTION

WittKieffer deployed an experienced interim CFO with deep expertise in healthcare finance, high-growth organizations, and capital markets.

Over the course of the 12-month engagement, the interim leader focused on:

- Building and strengthening the finance organization
- Designing repeatable finance processes and operating structures
- Overseeing core finance operations, including forecasting and capital planning
- Enhancing risk management and compliance programs
- Supporting fundraising activities, including investor and banking relationships

THE IMPACT

The organization established a finance foundation capable of supporting continued growth and increasing operational complexity.

- Strengthened finance leadership and organizational capability
- Enhanced forecasting, capital planning, and financial management rigor
- Implemented scalable processes to support continued growth
- Increased readiness for investor engagement and future capital initiatives
- Secured a major funding transaction, leading all aspects of investor materials development, financial analysis, and deal negotiation

CASE STUDY 02

Building an Investor-Ready Finance Function Following a PE Acquisition

THE SITUATION

A rapidly expanding ambulatory surgery center operator had recently entered a new phase of institutional ownership following a PE-backed transaction. The business needed a more mature finance function to meet investor expectations, strengthen performance management, and provide greater visibility into operations and profitability across a growing multi-site platform.

The company also required finance leadership that could stabilize and develop the existing team while helping build longer-term organizational capability, including the recruitment of a VP of FP&A.

THE INTERIM SOLUTION

WittKieffer deployed an experienced interim finance executive with deep PE-backed and multi-site healthcare experience, providing fractional leadership support during a critical period of transition. The interim leader was selected for their ability to operate quickly in a PE-backed environment, strengthen finance processes, and support both near-term execution and longer-term finance function development.

With no management layer between the team and the CFO, the interim leader stepped in to mentor and develop a highly junior finance team, providing day-to-day coaching, strengthening capabilities, and helping establish a more effective operating structure.

The interim leader focused on:

- Driving facility-level financial performance through data-driven P&L accountability and revenue optimization
- Building scalable finance systems to support rapid close, consolidated reporting, and executive-level visibility
- Leading strategic planning, budgeting, and financial analysis to support platform growth and profitability
- Providing financial diligence, modeling, and integration support for acquisitions and growth initiatives
- Partnering with WittKieffer's permanent search team to support the build-out of the finance organization through the successful hiring of a VP of FP&A

THE IMPACT

The engagement strengthened the company's finance foundation during an important ownership and growth transition. The interim advisor provided immediate execution support while helping create the structures needed for investor-grade reporting, better performance management, and continued platform expansion.

- Improved visibility into facility-level financial performance
- Created the financial infrastructure and reporting discipline needed to operate effectively under institutional ownership
- Strengthened reporting, budgeting, and financial analysis practices
- Advanced scalable systems and processes to support growth across multiple sites
- Supported M&A, diligence, and integration activity with stronger financial insight
- Developed and mentored a junior finance team, strengthening capabilities and creating greater organizational capacity
- Enabled a seamless transition from interim leadership to a permanent VP of FP&A

Leadership Implications

Interim finance leadership is not simply a stopgap; it reflects a more strategic, outcome-driven approach to finance function. In environments defined by pace, complexity, and investor scrutiny, leadership teams must prioritize execution readiness alongside long-term capability building. This requires clarity on where the finance function stands today, what is needed to meet current demands, and how to close gaps quickly without overengineering solutions.

For investors, boards, and executive teams, this means taking a more dynamic approach to finance leadership, combining permanent leadership with targeted interim support and deploying interim expertise across the finance lifecycle to accelerate performance, de-risk transitions, and position finance as a credible driver of value creation.

WittKieffer Interim Leadership Solutions

WittKieffer connects organizations with experienced interim and on-demand finance leaders who deliver impact in complex, high-stakes environments. Our interim executives combine deep expertise with the ability to operate from day one, bringing experience across investor-backed and publicly traded healthcare and life sciences organizations.

We deploy the right expertise at the right time, supporting transitions, transformation, and critical events across the finance lifecycle. Combining speed, flexibility, and proven experience, we help organizations strengthen performance, reduce risk, and move forward with confidence.

About WittKieffer

WittKieffer is the premier executive search and leadership advisory firm developing impactful leadership teams for organizations that improve quality of life. We work exclusively across healthcare, science, and education, providing essential knowledge, analysis, and perspective that produce effective leaders and inclusive cultures.

Improving Quality of Life through Impactful Leadership.

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