

## POSITION SPECIFICATION



### *Chief Financial Officer*

September 2022

**Robert J. Lambert**  
Managing Director  
+1.949.280.8800  
[rlambert@allegis-partners.com](mailto:rlambert@allegis-partners.com)

**Diego Ash**  
Director  
+1.323.377.0165  
[dash@allegis-partners.com](mailto:dash@allegis-partners.com)

## Confidential Position Specification

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Position	Chief Financial Officer
Company	Pioneer Metal Finishing
Location	Green Bay, Wisconsin
Reporting Relationship	Stephen Smith, President & Chief Executive Officer
Website	<a href="http://www.pioneermetal.com">www.pioneermetal.com</a>

## About Pioneer Metal Finishing

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Founded in 1945, Pioneer Metal Finishing (PMF) is North America's leading surface engineering company. For over 75 years, Pioneer has delivered consistent, quality metal finishing solutions for mission-critical applications. PMF's advanced surface modification technologies and scalable execution improve the performance of mission-critical products and enhance brand value for companies in the healthcare, automotive, A&D, and industrial markets. Pioneer offers the most comprehensive array of metal finishing services, including anodizing, electroless nickel, chromate, tin zinc, and precious metal plating.

Based in Green Bay, Wisconsin, Pioneer employs over 1,100 people across 12 locations in the United States and Mexico. PMF has grown considerably since 1945 and strives to help customers achieve their time-to-market and product differentiation goals through excellent customer service, technical support, and the most comprehensive array of metal finishing processes.

Pioneer's mission is to create value for its customers, associates, and shareholders by providing the highest quality products and services in the metal finishing industry. Success is measured by the relationships we build with our customers, employees, suppliers, and community. These relationships are based on trust, respect, and commitment to protecting the environment.

## About Aterian Investment Partners

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[Aterian Investment Partners](#) is a private equity firm that invests in industry-leading, middle-market businesses. In collaboration with management, Aterian supports investments throughout an organization, from people to processes, equipment, technology, and social governance, among other areas. With offices in New York and Florida, Aterian has raised cumulative equity commitments of more than \$1.5 billion since its founding in 2009.

## The Role

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Pioneer Metal Finishing and Aterian Investment Partners seek an operational and hands-on Private Equity Chief Financial Officer to help lead the organization through continued growth and expansion. Reporting to the President and Chief Executive Officer, the Chief Financial Officer will be a key partner to both the Pioneer

leadership team and Aterian principals working towards sustainable, long-term profitable growth, collaborating in developing and executing a strategic plan, and enhancing the overall operations of the company. They will assume accountability for providing strong leadership to a rapidly scaling organization as a strategic thought partner and the finance team leader. Working closely with the executive team, the CFO will be responsible for executing a compelling market-based business strategy generating exceptional shareholder value while accelerating the current profitable growth trajectory.

#### **ADDITIONAL RESPONSIBILITIES INCLUDE:**

- Provide the executive team and Aterian with proactive and accurate reporting on financial and operating results, including weekly flash and monthly and quarterly reports.
- Oversee the company's day-to-day financial operations, ensuring adherence to high levels of customer service, safety, cost control, reliability, and financial performance.
- Develop annual and monthly financial budgets and forecasts.
- Oversee core finance and accounting teams. Continue to build a best-in-class finance and accounting organization by developing and building the team.
- Provide leadership and day-to-day management of the internal IT organization and external vendors. Ensure a fully integrated approach to IT systems and processes consistent with the overall goals and objectives of the company.
- Advise leadership team on strategy, terms, and processes that align with an aggressive growth strategy, including cash flow analytics and scenario modeling.
- Lead ongoing business and operating performance against operating plans on a quarterly, monthly, and weekly basis.
- Lead internal finance and operational control functions, including cash management and tax reporting.
- Play a key leadership role in driving M&A strategy development and acquisition integration.
- Implement accounting policies, procedures, cost accounting supervision, and internal controls.
- Work effectively with executive teams in developing specific, measurable goals for performance and growth, using KPIs/OKRs, performance management, and annual operating planning and budgeting processes.
- Oversee financial and operational systems implementation, integration, and upgrades.
- Using data analysis and performance/operation metrics brings a detailed and robust performance orientation.
- Proactively identify and manage business risks, compliance, and insurance requirements.
- Lead annual audit process.
- Manage lender relationships and debt reporting requirements.

## Ideal Personal Profile

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- Is a role model to the entire organization – a participative leader who recognizes and appreciates all team members' potential contributions at every level of the organization.
- Data-driven and entrepreneurial; thinks and acts like an owner.
- A pragmatic leader who has played key roles in successful, enterprise-wide organization transformation efforts. Leading by example, the successful candidate will be a confident but humble and transparent executive, an exceptional listener who carefully balances top-down with bottom-up learning and change management.
- Collaborative across all dimensions – internally toward their team and ownership and externally toward customers and suppliers.
- Confidence to serve as a strategic thought partner to the Chief Executive Officer, aligning around a shared vision for the organization and shaping the financial strategy to support the company's business objectives.
- A high-energy, positively assertive professional with a bias for action whose instinct is to “make the call.”
- An individual who will reference with the highest values, ethics, and integrity; above reproach and able to handle sensitive, confidential information.

## Professional Experience/Qualifications

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- The ideal candidate will be an experienced Private Equity CFO who has played a crucial role in a successful exit.
- 15+ years' experience in a finance leadership role in a multi-site manufacturing environment.
- Has demonstrated both technical expertise and transformational management leadership in an aggressive M&A environment. Specifically, had led the integration of multiple acquisitions including driving the cost-benefit analysis and decision of what activities and processes to centralize.
- A proven track record as a highly operational and strategic executive who can identify and manage key revenue and cost drivers to grow revenue and EBITDA from their role as CFO.
- A proven, strong background in IT. Has led successful ERP systems audit and integration.
- Success in optimizing cash flow in an aggressive AR/AP environment.
- Experience building and leading teams in a collaborative way to drive business performance.

## Education

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B.A./B.S. or graduate degree in business administration, accounting, or finance. An MBA would be additive.

## Allegis Partners Contacts

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**Robert Lambert**

*Managing Director/Global Practice Leader*

+1.949.280.8800

[rlambert@allegis-partners.com](mailto:rlambert@allegis-partners.com)

**Diego Ash**

*Director*

+1.323.377.0165

[dash@allegis-partners.com](mailto:dash@allegis-partners.com)

**Angela Chow**

*Associate Director*

+1.213.225.0638

[achow@allegis-partners.com](mailto:achow@allegis-partners.com)