

# Beyond the Buyout: A Survival Guide for Finance Leaders in PE Environments

## Panel:

Moderator: Chris Ortega, CEO at Fresh FP&A

- Adedolamu (Dola) Isaac Shogelola, Strategy & Corporate Development Professional, GreyOrange Inc.
- Geetanjali Tandon, SVP of Financial Planning & Analysis, Dayforce
- Toph Day, CEO at Elevate Ventures

# Meet the Panel

- Chris Ortega – CEO, Fresh FP&A (Moderator)
- Adedolamu (Dola) Isaac Shogelola – Strategy & Corp Dev, GreyOrange Inc.
- Geetanjali Tandon – SVP of FP&A, Dayforce
- Toph Day – CEO, Elevate Ventures

# Learning Objectives

- Identify the key changes finance leaders face when transitioning to private equity ownership, including shifts in culture, operations, and strategy.
- Understand the expectations of PE sponsors, including reporting requirements, decision-making speed, and value creation mandates, and how to adapt finance processes accordingly.

# The Culture Shock (Day 1 to Day 90)

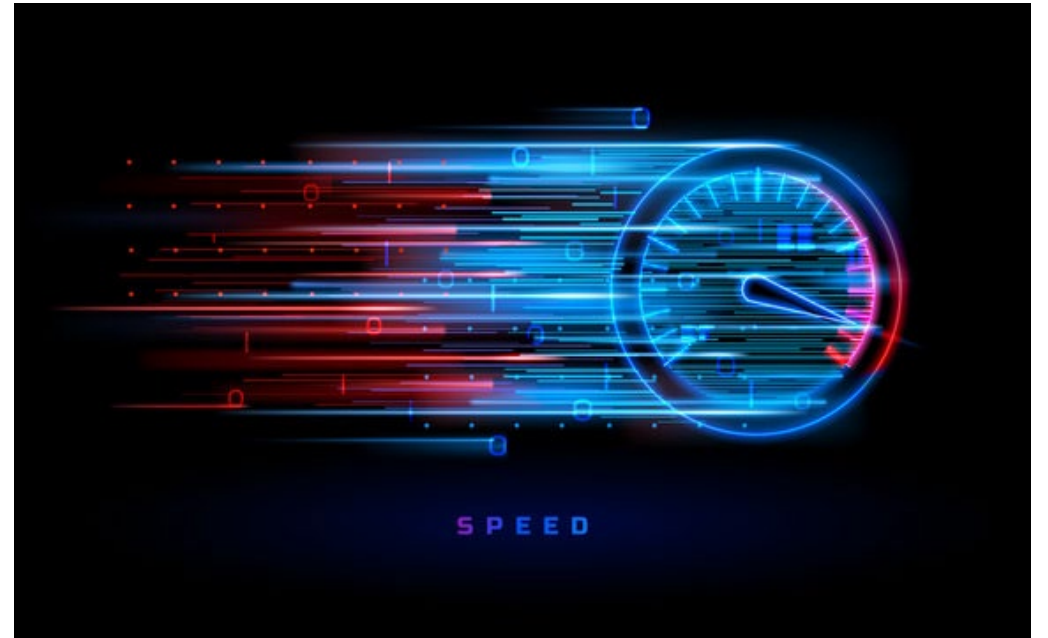
- “The Ink is dry. Now the real work begins.....”
- **Question: What actually happens when the new owner's step in?**



# The Operational Lift

- Reporting > KPIs > The Data Sprint

- **Question: How does the finance function need to evolve to meet PE speed?**



# Value Creation & The Exit

How does finance move from “scorekeeper” to “value advisor”?



Scorekeeper

VS



Value Advisor

**What are the  
common pitfalls you  
see during & after  
exits?**

# Recap

- The Reality Check
- The Culture Shock
- The Future

**What the #1 skill  
finance pros  
should be  
mastering now?**



Continue  
this discussion at  
the *"Working with  
Private Equity"*  
roundtable at  
10:30