

MJ CFO NAVIGATOR

Case Study:

Streamlining the Audit Process Improving Outcomes

CHALLENGE

A nonprofit organization with a strong commitment to operational efficiency sought a trusted accounting advisor to improve financial visibility, strengthen audit readiness, and provide strategic guidance. The organization had experienced recurring audit delays and findings, while leadership felt disconnected from key accounting and financial reporting processes.

SOLUTION

The organization engaged M&J's CFO Navigator team to provide financial leadership, enhance reporting processes, improve operational visibility, and serve as a strategic thought partner.

RESULTS

Within the First Year:

- Completed the annual financial statement audit nearly **two months earlier** than prior year & received **no audit findings or comments**.
- Improved financial visibility through monthly CRM-to-accounting reconciliations and enhanced performance monitoring, helping management proactively address key metrics while supporting a **24% increase in contributions** over the prior year.
- Successfully migrated to **QuickBooks Online**, creating a foundation for real-time budget-to-actual reporting, streamlined payment processing, and improved cash flow management

CONCLUSION

By partnering with CFO Navigator, the organization gained the financial insight, accountability, and strategic guidance needed to address operational challenges before they became larger issues. The result was a stronger financial reporting environment, a cleaner audit, improved processes, and better-informed decision-making, positioning the nonprofit for long-term success.