



Confidence Level in Business Conditions 12 Months Out
(2020-2021, 1-10 Scale)

Strat

7.07

6.95

6.77

CFO Confidence Continues To Climb In January

Isabella Mourgelas
November

December

January



Resilience 2021: 'Adapt, Improvise And Overcome'

Dale Buss

What does it take to build an anti-fragile company that can take a punch and throw one, too? We asked leaders across a range of sectors for top-of-mind takeaways for 2021.

CFO Confidence Index

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Intelliteach CFO: 'We're always looking down the road.'

David Buegler's role has grown along with the company, which is looking at further global expansion. He shares how he juggles the day-to-day along with longer term strategic vision.

By **Katie Kuhner-Hebert**



Intelliteach CFO David Buegler has a lot on his plate. He's responsible for managing all external investor, banking and vendor relationships, as well as the internal financial and administrative functions, encompassing finance, accounting, human resources, facilities management and a variety of strategic initiatives.

Part of that increased workload is owed to significant growth. Since Buegler joined in 2005, the company, an Atlanta-based provider of outsourced solutions for legal and accounting firms, has grown from a team of 90 individuals to more than 600 global employees in five domestic offices and locations in Toronto, London and Goa, India.

Buegler took time out to talk about the evolution of his role and how he is helping to shape the company's future.

How has your role evolved as your company has grown in complexity?

Early on, my role was more singularly focused on managing day-to-day business needs. That has changed as the organization has grown to where we are today. Our team is now much more strategic than it was in the beginning, changing from just one main office with people dispersed to now, where we have five domestic and three international offices. Today I'm much more focused on how we're going to continue to grow the business, particularly as we acquire more companies and expand our services with new strategic partners.

As we've expanded our international offices, I've helped lead the effort to find the right locations and handle the regulatory issues. It's not just a matter of finding office space — you have to identify the right region or country that you're going into, determine whether the location is a good fit for how the company is structured, and whether it should operate independently or as a branch.

Once we've done that, then we identify a specific city where we're going to operate. It's really less about identifying a specific property and more about identifying the areas where the company can optimize any tax issues, find the best labor pool—really those bigger strategic items.

I've also led the efforts to migrate our accounting system to better support our international offices, effectively enabling us to directly service external and internal clients' accounting, HR and payroll systems. I've also been involved in our employee benefit plans over the last 15 years, with health benefits as the biggest driver.

How are you working with the company's CEO to manage the fast growth?

The biggest area as we are growing quickly is to work with the C-Suite to identify the key areas of involvement and growth moving forward, working with our sales team, the operating team, our technology team and CTO, and our CEO.

For example, as we grow our IT managed services solution, we had to make the decision to also grow the number of engineers in locations and the technology to support that. That required input from multiples areas of expertise to make the decision.

I also work closely with the CEO on future strategy. We're always looking down the road two to three years, if not longer. If we want to continue to grow, we need to make sure we're in the position to make key investments, identifying where to put our dollars in order to get the best growth, and to best serve customers and employees.

Tell me about the acquisition of another legal IT provider, Hilltop Consultants – how did your company handle such a large strategic initiative in 2020?

It was a team effort. We have a very good executive team across our company, so we were fortunate in that we could leverage each person's area of expertise. Where I played a part was to help lead that effort was bringing together the IT and sales relationship leadership teams when needed, as well as overseeing financial due diligence. Another key was understanding the data available – Hilltop has a long history of managing strong client relationships, just like we do, so it was key to understand how they do things and coordinate our processes. We were able to get all that done in a pretty short period of time by leveraging everyone's expertise.

What's on tap for 2021, and what is your role within these plans?

The key thing for us, given that we're a service business, is to stay ahead of the curve, both with service delivery and the new service offerings. Clients are always looking for ways they can improve their businesses and better serve their internal and external clients, and we're looking forward to bringing more innovative services on the IT and administrative fronts. I'm working with the CEO on product development, pricing and determining investments and expected returns, as well as how to best roll new services out within our sales and operations organizations.

The other key issue in 2021 is continuing to expand international offices. One is in India, and my involvement there is to make sure we're adding correct senior management there who can complement the management here in the US. We expect add 50 to 100 people this year, so we're really making sure we have a high level of expertise to continue to grow that office.

Katie Kuehner-Hebert

Katie Kuhner-Hebert has more than two decades of experience writing about corporate, financial and industry-specific issues. She is based in Running Springs, Calif.