



Board North

Where strategy meets AI.

**CFO-led Growth Partner
for Ambitious Businesses**

We help leadership teams use AI and automation to scale, build value and create wealth, with clarity and confidence.

Who We Are

Board North is a CFO-led, AI-powered growth partner for ambitious SMEs and PE-backed businesses. We connect strategy, finance, operations and data, then implement automation and AI tools that free capacity, reduce costs and drive measurable ROI.

Headquartered at Sci-Tech Daresbury, we blend board-level financial expertise with hands-on delivery, delivering change that sticks and systems that scale.

We don't just advise, we build, embed and prove results.

Typical clients:

- Scale-ups preparing for funding or exit (or wanting the choice of exit)
- PE portfolio companies seeking control and insight
- Established SMEs modernising operations and improving margins

Why We Exist

Only 1 in 10 UK businesses ever achieve a successful sale or succession. Most don't fail because the idea was wrong — but because they lacked scalable systems, usable data and decision-making discipline.

Board North exists to change that.

We build AI-ready, data-driven operating systems that enable founders and leadership teams to:

- ✓ **Scale without chaos**
- ✓ **Build transferable business value**
- ✓ **Create wealth and optionality — whether to raise, exit or hand over**

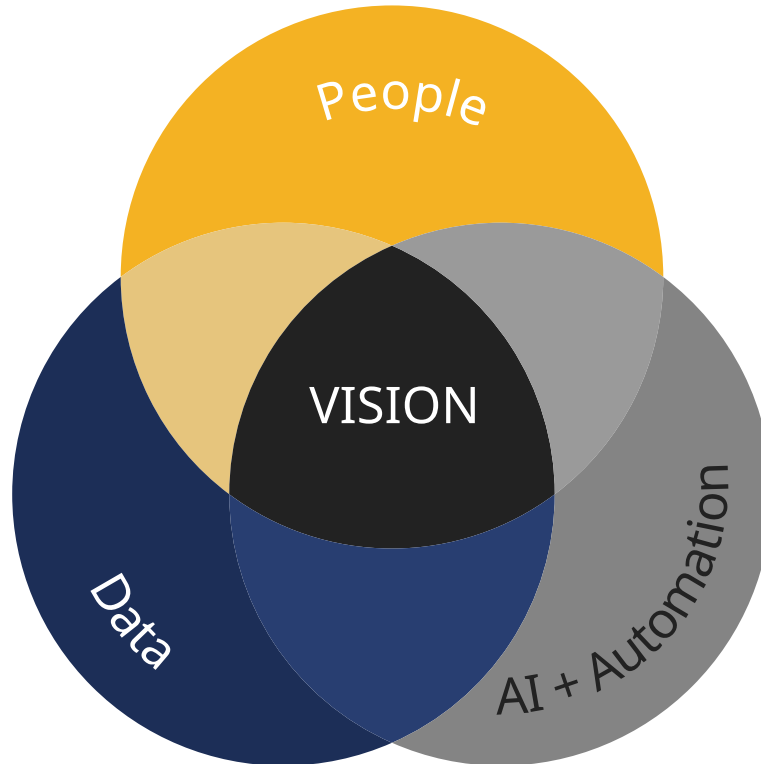
Why Leadership Teams Choose Board North

- ✓ **AI you can trust:** Safe, governed, practical tools; not hype.
- ✓ **CFO discipline:** Every decision linked to cash and valuation.
- ✓ **Scalable foundation:** Systems that make you exit-ready.
- ✓ **Local partnership:** Based in the North West, with national reach.
- ✓ **Human approach:** Technology that empowers people, not replaces them.



Vision

Delivered through the Board North Operating System©, our workshops bring a proven approach to leadership alignment. We help boards and senior teams connect vision, data, AI process automation and people driving consistent execution and growth.



The Board North Operating System: Your Blueprint for Value

The Board North Operating System is the framework we use to transform your strategic ambition into a structured, high-growth driving force.

Strategy

Using the powerful EOS system, we define your Core Values, Purpose, and Mission. This locks in alignment for your 10-year, 3-year, and 1-year goals, to ensure every action is profitable and purposeful.

Vision

Your vision is the first step to wealth. We hammer out a clear 10-year target and break it down to create a roadmap for success.

People

We ensure you have the right people in the right seats, backed by senior management support and accountability from our structured, high-impact workshops.

Operating Rhythm

Stop wasting time in meetings. We implement a strategic rhythm that your senior team will adopt, driving consistent, measurable results through focused execution.



Scorecard

We set up the vital, real-time KPIs to track execution against your 1-year targets. This is the single, trusted version of the truth that eliminates guesswork and excuses.

Processes

Defining and standardising your critical workflows across the entire business. This is where we lay the groundwork for reliable, scalable AI automation.

Execution

Turning high-level strategy into daily action through disciplined Rocks, ensuring the whole business is locked on targets that generate revenue.

“ *Visibility creates accountability. When the right numbers are measured, reviewed weekly, and owned, performance transforms.*



Data

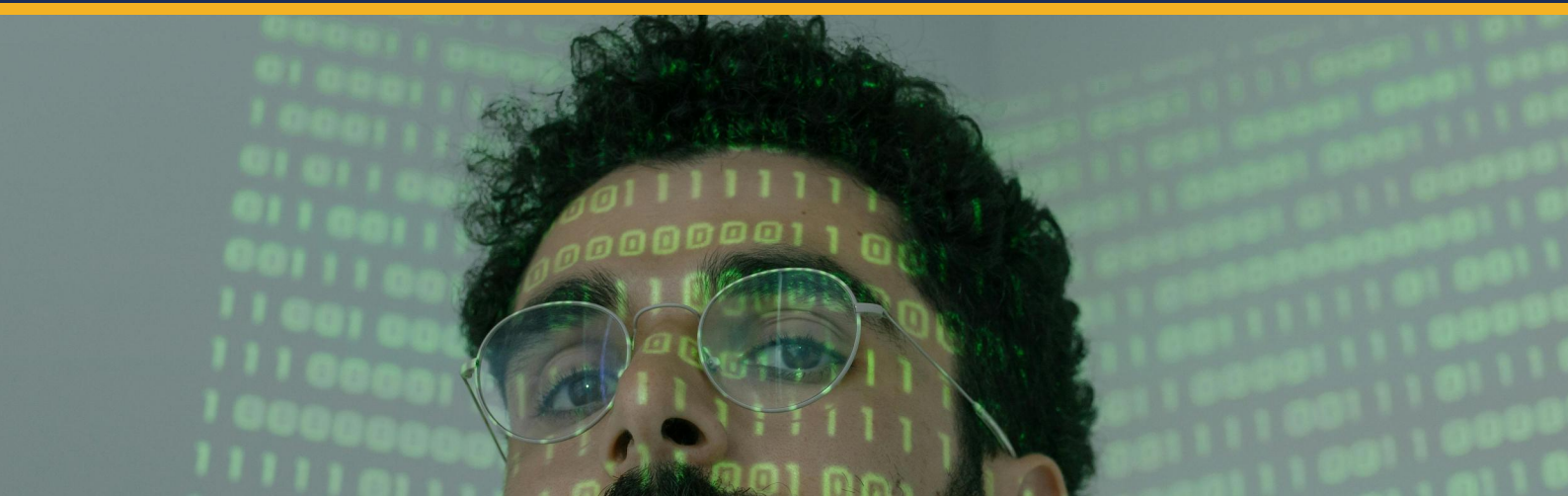
Our team supports everything from data architecture and reporting design to automated dashboards and board packs, giving leaders a single source of truth across finance, operations and people.

We use proven, industry-standard technologies and tools to ensure a reliable experience.



AI Automation

Automate your advantage. Board North deploy AI to cut waste, accelerate workflows, and embed intelligence across your business, delivering tangible ROI and empowering teams to focus on strategy.



**“When strategy, structure and people are aligned, execution rates more than double.
(Harvard Business Review)”**

People

People are at the heart of the Board North Operating System©. Our approach starts with leadership alignment, creating clarity and focus through strategic Workshops and extends across the organisation through practical Training that builds capability, confidence and cohesion.

What Our Customers Say

“Board North gave us the visibility we’d been chasing for years. We finally feel in control and can focus on growing the business instead of drowning in admin.”



What Makes Us Different

- ✓ **CFO-Led DNA:** Real-world finance discipline with digital delivery expertise.
- ✓ **Automation That Pays Back.** Every build is tied to P&L impact: cash, margin or valuation.
- ✓ **Human-Centred Change:** We make AI adoption practical, ethical and people-first.
- ✓ We use the latest and **most trusted technologies**, tailored to your company.
- ✓ **Measured Impact:** Clear ROI reporting, live dashboards and tangible results quickly.

The Outcome

- ✓ **Scale with control:** Automate processes, reduce manual work, improve cashflow.
- ✓ **Build wealth:** Drive stronger EBITDA and increase valuation multiples.
- ✓ **Be exit-ready (even if you don't want it yet):** Systems that run without you, audit-ready data, transferable IP.
- ✓ **Lead with confidence:** Insight on demand, clarity in decision-making.



Our Story

“*I’ve worked with hundreds of businesses, from start-ups to global firms, and I’ve seen what makes a company truly work.*”

I began my career at **Ernst & Young (EY)** and **RSM**, working with growing businesses across the UK. Over the years I’ve seen the full spectrum: the well-oiled machines that scale effortlessly and the ones where talent, opportunity and capital get wasted through poor systems and lack of alignment.

When I scaled a **waste and environmental business to £18m turnover**, I realised something crucial:

I could have done it faster, better, created more wealth, and had a smoother exit.

That experience changed everything.

It taught me that growth doesn’t just come from hard work, it comes from **clarity, systems and the right operating rhythm**. So I set out to create **Board North**: a CFO-led scale and grow operating system that uses **AI, best-practice leadership and data** to help other business owners achieve what took me years, in a fraction of the time and to do it with more control, less stress, and stronger outcomes.



How it works – Your Template for Success

Every business demands a custom strategy. That's why we dive deep into your organisation, then engineer a perfectly tailored solution utilising our global network of 1,200 specialists in finance, data, and AI. The result? You get the strategic depth of a global firm, executed with clarity and conviction. Crucially, we enhance your existing stack - we don't waste time replacing your existing ERP.

Phase 1: The Initial Assessment

We always kick off with an Initial Assessment of your business. This is the critical first strike where we evaluate your financial health, data, and any strategic gaps. This pinpoints your biggest, most profitable opportunities in AI, efficiency and growth acceleration.

What's included:

The Initial Assessment provides a clear roadmap to profit. You gain total control, allowing you to pick and choose the exact, high-impact services you need, perfectly matched to your existing resources and capabilities.



Phase 2: Flexible Engagement Models

You dictate the engagement. We can either provide the playbook and structure or we can execute a full-scale implementation for you. You only pay for the resources you need - no waste, just impact.

We offer three paths to success:

Defined Projects (Fixed Project or Discovery Assessment)

This is your guaranteed, scoped business transformation. We execute end-to-end projects that seamlessly connect your data, AI tools, and process improvements for a rapid win.

Outcome: A successfully delivered project with a quantifiable ROI and permanent operational advantage.

Fixed Projects (Monthly Milestones)

This model locks in a structured engagement with clear deliverables and a consistent team. You get reliable, focused progress against agreed milestones.

Outcome: Agreed milestones and dedicated monthly hours with the same specialist team, guaranteeing momentum.

Fractional Team (Ongoing Strategic Support)

The ultimate competitive advantage: a dedicated professional assigned to your business — a Board North Fractional CFO. Combining high-level strategic leadership with continuous data and automation expertise, they instantly become the most valuable extension to your team.

Outcome: Continuous strategic support, rapid scalability, and a dedicated expert embedding the Board North Operating System to drive relentless growth.

Next Steps

- ✓ **Book a 20-minute fit call:** Confirm outcomes and quick wins.
- ✓ **Start a Discovery Sprint:** Map automation ROI and data opportunities.
- ✓ **Build for value:** Scale, systemise and prepare for an optional exit.
- ✓ **Let's scale with clarity, confidence and wealth creation in mind.**

Book a Call

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