

## Position Profile

# Vice President, Finance and Administration

Reports To: President and Chief Executive Officer

Organization: Online Business Systems

Date: June 2025

### ABOUT ONLINE BUSINESS SYSTEMS

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Online Business Systems (Online) is dedicated to guiding businesses through the evolving digital landscape with cutting-edge cybersecurity and digital transformation strategies. Their expertise spans almost four decades, delivering tailored solutions that safeguards digital assets and propels businesses forward. The Online holistic approach balances innovative technology with the human element, ensuring businesses' digital journey is seamless and secure.

Online Business Systems stands out through unparalleled service delivery, a unique culture of loyalty and trust, and an unwavering commitment to shared success. With nearly four decades of experience, Online has upheld stringent hiring standards alongside fostering career growth through mentorship and professional development. Online has a strong and growing presence in the United States, where one-third of its revenue is generated. This cross-border footprint reflects the company's ability to deliver value across diverse markets while maintaining its core values and service excellence. Online is dedicated to doing what's right—not just for clients but for the team of "Onliners" which ultimately yields measurable outcomes: high morale, low turnover, and recognition as a top workplace.

Online achievements include winning the Great Place to Work® (GPTW) award in Canada for 17 consecutive years, a testament to the supportive environment and strong company culture. These accolades reflect OBS high Glassdoor ratings and reputation for being an exceptional place to work, underlining the commitment to the well-being and professional growth of the team.

### ABOUT THE VICE PRESIDENT, FINANCE AND ADMINISTRATION POSITION

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The Vice President, Finance and Administration (Vice President) is a strategic executive role responsible for financial stewardship and driving organizational performance and scalable growth. This role oversees all aspects of finance and operations, ensuring compliance, operational efficiency, and cultural alignment. The Vice President plays a key role in executive decision-making, resource planning, and organizational design, while also serving as a client-facing ambassador and internal sponsor for leadership and development programs. The Vice President is responsible for advising, evaluating, and assisting Online with its financial plans, economic modeling, and all fiscal

and fiduciary responsibilities in conjunction with the governance, finance, corporate, audit, and investment for the operations. This position is central to enabling profitable growth, fostering employee engagement, and maintaining operational excellence across the enterprise.

## KEY LEADERSHIP ACCOUNTABILITIES

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### Executive Leadership

- Integrates and aligns financial and people resources to enable practices to profitably address client needs while providing growth opportunities for Onliners to expand their contributions and value to the three-legged stool.
- As a member of the Strategy and Operations Roundtable (SAOR), advocates and increases awareness of the financial perspectives, ensuring:
  - Potential new ventures clearly outline resource requirements and that those requirements align with the available resources of Online and do not conflict with existing priorities.
  - Resources are prioritized and aligned with the agreed-upon priorities established at Leadership Planning Meetings (LPM) and monitored and reported on through SAOR.
  - Alignment of people and organizational structures to support operational and financial performance in response to executive decisions.
  - Collaboration with practice leaders to address areas of constrained performance, diagnosing and supporting corrective action to return to expected financial performance.
- Drives financial aspects of the LPM agendas ensuring they are advocated for and considered in collective decision-making.
  - Captures data on expected financial performance and reports on actual financial performance, facilitating actions to return underperformance to baseline.
  - Working with practice leaders mobilizes appropriate financial and people resources to support annual, quarterly, and monthly priorities.
  - For internal initiatives, monitors and reports resource consumption actuals vs. plan, ensuring expenditures of effort and finances are controlled.
- May be delegated temporary authority during the absence of the Chief Executive Officer to support continuity, timely operational decision-making, and assure continued focus on organizational priorities and performance.

### Financial Stewardship and Performance

- Collaborating with the finance team ensures the finance function supports the Practices in achieving Online's organizational outcomes and performance objectives. Is accountable for all operational aspects of finance, including accounts payable, accounts receivable, cash management, payroll, taxation, and purchasing, in addition to completing regulatory and creditor filings.
- Acts as the steward of Online's financial resources, raising organizational awareness of financial performance while seeking to integrate financial performance into the operational cadences and discussions across Online's practices and supporting functions.

- Working with Sales and Practices ensures deal structures return at a minimum industry average gross margin targets. Reviews client contractual obligations to ensure compliance with audit and risk management thresholds and does not put Online at material legal, financial, reputational, or operational risk.
- Sponsors and executes the annual budget planning cycle, collaborating with the Vice President, Sales and Practice Leaders to define revenue targets and associated expenditures. Monitors and analyzes actuals and forecasts to determine areas that are performing to plan and assist underperforming areas in returning to expected performance levels.
- Accountable for preparing year-end financial reports and audit working papers, working with the finance team to produce year-end financial statements for the ownership group and for input into annual audit processes.
- Establishes and communicates policies related to financial controls to minimize fraud risks and address deficiencies in internal controls, as identified through audits or reviews. Ensures all financial reporting accurately reflects Online's financial position by overseeing financial data and records.
- Maintains sound working relationships with international banking partners. Works with banking partners to acquire additional financial instruments as necessary for growth and operations.
- Working with the finance team and people care in the development of incentives, including reviewing and approving incentive payments.

### Operational Effectiveness and Scalability

- Accountable for leading efforts to improve Online's profitable scaling through operational effectiveness improvements, enabling a foundation for growth without unnecessary overhead expenditures.
- Independently and in collaboration with peers identifies, sponsors, and implements feasible solutions (technology, process change, role design) to reduce overhead and improve the quality and speed of support provided to Practices.
- Collaborating with Practice Leaders and integrating the financial perspective, acts as a partner in resolving organizational design constraints to enable maximization of Practice operational and financial performance.
- Supports Practices and back-office functions in aligning structures and resources towards Online's organizational performance objectives and desired outcomes. Assists in the architecture and allocation of resources to achieve growth targets.
- Reviews internal programs to assess effectiveness and value, implementing corrective actions to bring programs back into alignment with expectations and desired outcomes.

### Client Relations and Executive Sponsorship

- Acts as an ambassador of Online to external stakeholder communities, including acting as a client-facing executive on top pursuits, demonstrating Online's executive commitment to client success.
- In coordination with other Practice Leaders, develops Online's brand through participation in industry speaking engagements and other marketing efforts where executive coverage is required or of benefit.

## EDUCATION AND EXPERIENCE REQUIREMENTS

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The ideal candidate for the Vice President, Finance and Administration will bring over a decade of progressive leadership experience, with a strong track record in financial management. This individual will have demonstrated success in executive-level planning, resource alignment, and cross-functional leadership, ideally within a consulting or professional services environment. Experience participating in strategic forums and driving enterprise-wide initiatives is essential.

A deep understanding of financial operations is required, including budgeting, forecasting, cash flow management, and regulatory compliance. The candidate should be adept at financial reporting, audit preparation, and internal controls, with experience in evaluating deal structures and managing risk in client engagements. Familiarity with banking relationships and financial instruments to support growth is also expected.

The ideal candidate will have experience leading transformation initiatives that improved scalability and reduced overhead. Experience implementing technology and process improvements, resolving organizational design challenges, and aligning resources with strategic goals is essential. The role also requires experience in client-facing executive sponsorship and representing the organization in external engagements, including industry events and marketing initiatives.

- Bachelor's degree in Finance, Accounting, Human Resources, Business Administration, or a related field
- CPA (Chartered Professional Accountant)
- Extensive senior leadership experience in both finance and operations functions, ideally within a professional services or consulting environment.
- Proven track record in:
  - Overseeing financial operations (budgeting, forecasting, audits, compliance)
  - Driving operational efficiency and scalable growth strategies
  - Acting as an executive sponsor in client-facing roles and external stakeholder engagements
- Experience with organizational design, change management, and cross-functional collaboration at the executive level.
- Familiarity with international operations.

If you wish to explore this opportunity, please contact or submit your resume to:

**LILLIAN WONG, Director, Executive Search and Recruitment**  
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