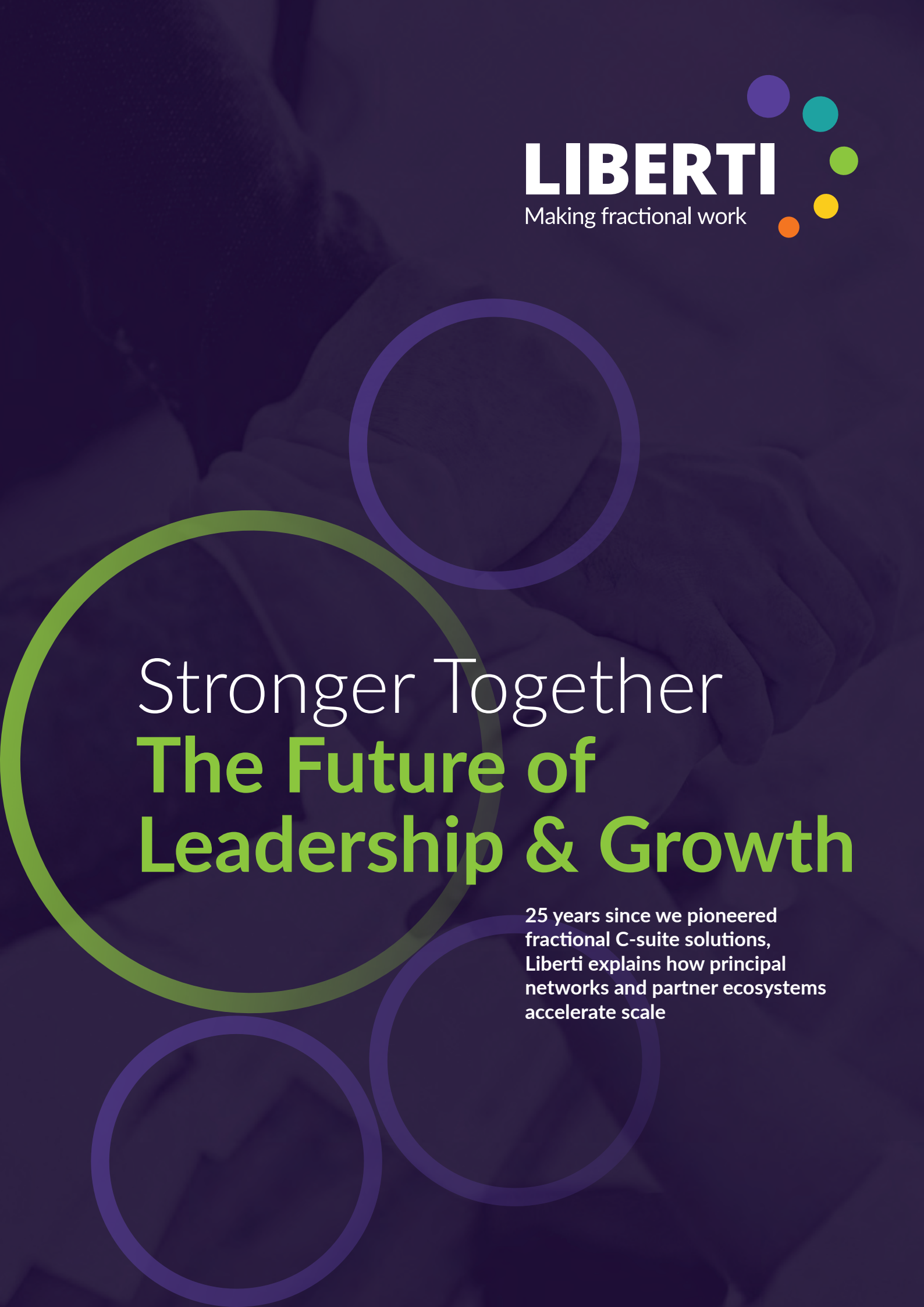




LIBERTI

Making fractional work

Stronger Together **The Future of Leadership & Growth**

25 years since we pioneered
fractional C-suite solutions,
Liberti explains how principal
networks and partner ecosystems
accelerate scale



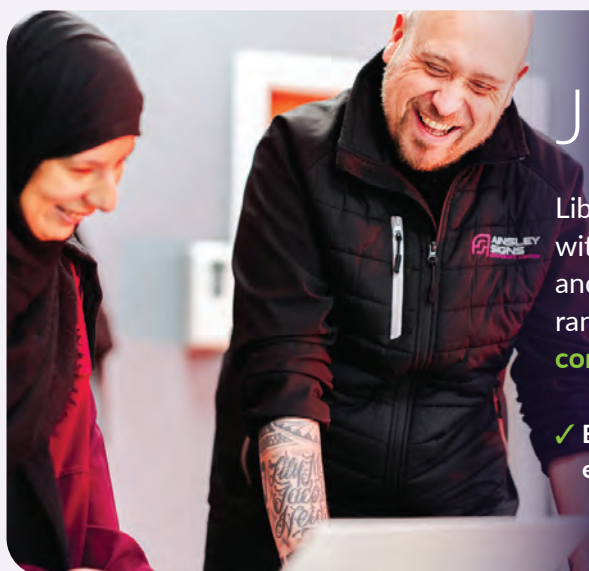
At Liberti, we make fractional work

Since pioneering fractional leadership in 2001, we have given thousands of ambitious organisations the freedom & flexibility to scale smarter without the overhead of full-time hires.



Across Liberti, 60+ Regional Directors are matching business owners around the UK with over 600 of the right fractional experts at the right time from market leaders in finance, marketing, sales and HR.

Visit thelibertigroup.com to find out more.



Join our Liberti Club

Liberti Club now supports our growing community of clients with access to regular insight, events to network and learn, and our ecosystem of trusted partners and advisors across a range of business services. [Find out more at thelibertigroup.com/liberti-club](http://thelibertigroup.com/liberti-club)

- ✓ Exclusive peer & expert learning events
- ✓ Curated business insights & advice
- ✓ Network of peers, principals & partners



The Future of Leadership & Growth

According to the Recruitment & Employment Confederation, a bad hire at mid-manager level with a salary of £42,000 can cost a business over £132,000 when you add up the expense of the recruitment process, training, onboarding, and wasted salary.

The cost of a bad executive hire could be up to four times salary plus incalculable damage to team morale, reputation or investor confidence.

For scaling businesses, the cost and risk are exponentially higher. SMEs are looking for new ways to access skills and capabilities more affordably and see the impact more quickly.

The future of work is fractional

As the cost and risk of a bad hire has risen, so has demand for an affordable and effective alternative. This is driving demand for fractional C suite solutions.

Britain's mid-tier firms generate over a quarter of national turnover and 1.4 million SMEs collectively delivered sales of £2.8 trillion in 2025 (ONS), but only 44,500 have achieved at least 3 years of sustained 20% growth according to the ScaleUp Institute.

There are 766,847 family firms in the UK, contributing £1.6 trillion to the economy, but only 58% have boards and 60% are looking to access fractional leadership, according to research for Family Business UK.

SMEs are the biggest users of fractional globally at 61.4% and represent 90% of global businesses, according to Data Intelo, which predicts that the global fractional executive market will almost triple to \$24.7 billion by 2034.

In 2022, just 2,000 people described themselves as fractional professionals on LinkedIn. In January 2025,

this had risen to 142,000 listing fractional in their job titles – and 73% of these are working with scale-up and mid-tier businesses.

While one fractional leader can have a big impact on an ambitious business, a national fractional C suite network can be a game-changer for the UK economy.

Mid-tier firms comprise the majority of clients supported by Liberti and our group of fractional specialists across Finance, People, Sales and Marketing. Our UK team of over 600 fractional leaders supports over 1400 mid-tier clients, matched and managed by over 60 Regional Directors.

An ecosystem of partners enhances our on demand fractional support - and this combination has created a new model of growth for UK SMEs.

The future of growth is partnership

Partnership enables both SMEs and fractional professionals to punch above their weight. A well managed partner ecosystem creates opportunity and helps everyone to capitalise on it. It fills gaps in capability with the right expertise at the right time.

On-demand access to fractional professionals and business service partners is the future of leadership and growth, but understanding how to maximise this is the true game-changer. Liberti Club was created to help our growing community of clients to find the right support at the right time.

This report explains how fractional as a service is evolving to meet growing demand from organisations of all sizes and at different stages of scale. Bringing together perspectives from founders and CEOs, fractional professionals, regional directors and partners, it highlights the importance of networks and partners in making decisions that drive growth. Stronger together.

More than the sum of our parts

25 perspectives on fractional leadership and partnership for growth from Liberti Club's community of founders, clients, principals, regional directors and partners.



Alex Evans - Liberti Club Director

"Social capital, and the role played by local entrepreneurial ecosystems to help founders learn from peers and connect with partners, is vital to SME growth."



Ally Maughan - Founder & CEO, People Puzzles

"Would you rather have 100% of someone learning on the job, or 20% of someone who's solved this problem 100 times before?"



Amanda Browning - CEO, Amber River Shipman Wealth

"The greatest impact comes when fractional leaders work in tandem with financial planners, ensuring that commercial decisions support business growth and also strengthen the founder's personal financial position and long term goals."



Andrea Millington - MD, Preedy Glass

"If the business needs a different specialist in the future, they have a network of fractional experts you can tap into. It's flexible, practical and focused on what's right for the business."



Andrew Milbourn - Founder & CEO, Kiss The Fish

"A fractional Sales Director is more than a consultant, they're a catalyst for transformation, not just improving sales performance, but changing behaviours, systems, and results."



Liz Jackson MBE - Director & Co-owner, Initium

"Being able to tap into Liberti's ecosystem of CFOs, CMOs, CROs and CPOs means we can support value creation with the leadership capability to grow EBITDA."



Colin Mills - Executive Chairman, Liberti

"As a pioneer and champion of fractional leadership, Liberti is about more than freedom – it's about timely connections from networks and partnerships."



Dale Broadhead - Managing Director, Ainsley Signs

"If you're a small to medium sized business driving the next stage of growth fractional is 100% worth looking into, not just because it's cost-effective but it gives you clarity of how to achieve it."



Jason Gerlis - CRO, GoGlobal

"Liberti Club's ecosystem brings together specialists who solve different parts of the same growth challenge. For our clients, that means better decisions, joined-up thinking and fewer gaps between strategy and execution."



Sarah Clark - CEO, The Legal Director

"When we refer a client to the CFO Centre or People Puzzles, we're not just making an introduction. We're extending the support network around that client in a way that makes everyone more effective."



Fareeda Jaleel - Fractional CMO, The Marketing Centre

"I wear both a marketing and a commercial hat as a fractional CMO, but we expand our support by bringing in different subject matter experts from our partner ecosystem."



Helen Stenhouse - Co-founder, People Puzzles

"Fractional is more than a movement and should be factored into Government policy for the future of work because it affordably fills the leadership capability gap that has long been a barrier to scale in the UK."

**Jamie Mills** - CEO UK&I, The CFO Centre

"Due to client demand, our service offering has expanded to mentoring finance teams at the smaller end of the scale, right through a client life cycle to fractional twinning of large corporates."

**Jennifer Raines** - Founder, YRH Finance Team

"Why hire one person when you can have an entire finance team? Our clients typically see 12-18% profit improvement, £50k-£120k in cashflow enhancement, and 10+ hours a week returned to leadership."

**Joseph Mills** - COO, The CFO Centre

"Regional Directors are fundamental to how our model works, building trusted relationships, bringing business leaders together, sharing market insights, and supporting new principals."

**Leah Boxell** - Founder, Enablists

"Partner ecosystems are so important because they offer access to many different skills. I always work on referrals and I always ask people's opinions on who they've worked with as well."

**Lisa Wright** - Fractional CFO, North West Lancashire, The CFO Centre

"It's a balance of both technical skills and personality that gets you into the 1% Club. The team are looking for individuals with energy, drive, and a sense of fun."

**Lucy Hogarth** - Founder & CEO, The Marketing Centre

"Choosing the right fractional CMO usually starts with a conversation about where the business is today and where it wants to go next."

**Malli Kini** - Partner and co-lead of Entrepreneurial Services, Blick Rothenberg

"Fractional solutions complement the work of external advisers because they ensure there is someone internally who can act on the advice and drive implementation."

**Mark Nunny** - Investor, BGF

"We often work with wider people networks, from groups such as Liberti to individuals and non-execs, to enable the businesses we're backing to access the right people at the right time."

**Matthew Mills** - UK & Ireland, CRO, The CFO Centre

"You access way more than a fractional CFO because you get the benefit of their wider relationships and shared knowledge across over 750 CFOs globally."

**Phil Barton** - CEO of Partners&

"As we have integrated more with Liberti as both a client and partner, we're finding new ways to grow together."

**Sara Daw** - Group CEO, Liberti

"Consultants diagnose and advise from the outside, but fractional C-suite leaders get inside the business, drive the strategy and do the work."

**Steve Harvey** - CEO, Camena Bioscience

"Working with the Liberti 'ecosystem' of part time Directors as and when we've needed it in the early stages of developing the business has been invaluable in setting our foundations for the next phase of growth."

**Tom Pape** - MD, Jam Pan

"The fractional model aligns closely with our own DNA as a flexible, expertise-led business model. We wanted experienced people who could come in, quickly understand the business, and make an immediate impact from day one."

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Fractional freedom

The word 'Liberti' refers to slaves that were granted freedom in ancient Rome. For years, like many others, I was a slave to my career as a corporate CFO before I liberated myself as, what we now call, a fractional finance leader.

We're told the pinnacle of success is the C-suite: bigger titles, larger teams, higher salaries. Yet, too often, what comes with that is constraint: politics over performance, time poverty over autonomy, and risk concentrated in a single employer. We become highly paid employees with diminishing control over our own destiny. Executive freedom challenges that model.

The traditional executive career path is outdated in a world that now values agility, expertise and outcomes over hierarchy. More executives are leveraging their experience across multiple businesses, industries and projects to build a portfolio career – reducing risk, increasing earning potential and regaining control of time and choices.

But this requires C suite leaders to reframe one's mindset from employee to entrepreneur, define niche and value proposition, build credibility and a strong personal brand, develop networks that generate opportunity, and structure engagements to deliver clear, measurable impact. Clients pay for wisdom, pattern recognition and execution, not presence. It's a big psychological leap to shift from 'role' to 'expertise' and let go of status; but it means your career becomes an asset you own rather than a position you occupy.

Executive freedom isn't solely financial. It's about choosing where you work, who you work with and how much you work. It allows space for family, personal ventures, mentoring or even multiple commercial interests. It's not early retirement, it's sustained relevance. Fractional is building as a movement because it's the future of executive work and a model for our times. It's also liberating founders from traditional recruitment and both the cost and risk of the wrong executive hire. It's an economic game-changer because it provides scaling



SMEs with affordable access to experienced leaders that can truly accelerate growth.

As a pioneer and champion of fractional leadership, Liberti is about more than freedom – it's about timely connections from networks and partnerships. Relationships have always been key to the development of this business over the years. Relationships between ourselves, between our teams, with our clients, and with our partners. We have pioneered the thought that 'together we will be stronger'.

This commitment to relationship and connection has now been brought to life in a tangible and exciting way with the launch of Liberti Club. Designed to bring people together through a dynamic programme of events, the Club will create opportunities for clients to connect, share ideas, and build meaningful relationships in an environment that encourages collaboration and curiosity. It represents an important step forward in how we foster community, not just within our organisation, but across the wider team we work with everyday.

Liberti has operations in the UK, Europe, US and Asia Pac. What is the next evolution of fractional?

"I think we will begin to see the unbundling of services over time. Sector specific offerings, specialisms (M&A versus fund-raising, market expansion, etc), support for different types of clients (start-ups, scale-ups, mid-market or enterprise) and team delivery of services rather than just individual fractionals are all likely to feature. Of course, being in this game for many years and seeing these trends evolve means we are already developing our services along these lines, so we are well placed."

Colin Mills - Executive Chairman, Liberti
colin.mills@thelibertigroup.com

How fractional leaders turn scale-ups into grown-ups



I was pleased to see that the middle children of the UK economy, the scale ups, grew to over 44,000 in 2025, according to the latest annual report from the Scale Up Institute.

They punch well above their weight in terms of job creation, productivity and GDP. They account for just 0.6% of SMEs, but contribute over 55% of revenue for all SMEs. Now under the EIS scheme, they will benefit from doubling the annual investment limits (to £10m), total investment (to £24m) and company size (to £30m).

The growth enablers have been the same for the last decade, according to the Scale Up Institute: access to markets, talent, finance, infrastructure and leadership capacity. Building the capability of the senior leadership team is crucial to unlock growth potential from all of these enablers.

A typical executive search takes around 90-120 days to complete and the cost of a bad hire at this level can reach 213 % of the employee's salary. Not to mention the damage to morale and investor confidence. For smaller businesses, this risk just isn't viable.

Often, startups and growing SMEs don't want, need or have the budget for a full-time employed C-suite; but they absolutely need the talent, skills and leadership capability to scale. A fractional CxO is the most cost-effective way to access credibility, experience and valuable networks that drive scale.

There's just one problem. Too many people are 'having a go' at fractional. On LinkedIn alone, the number of people describing themselves as fractional jumped from around 2,000 in 2022 to roughly 142,000 in 2025. Many of these are having a go until they return to full time employment. But the right ones, who can really have a long-term impact on scale ups and growing mid-tier businesses, have the right mindset and motivation, not just the skills and experience. The real value is created in the mid-to-long term, past the start-up

phase. That's where we need to focus, backing this segment of businesses and pairing them with the right talent so they can reach their full potential.

And when they do grow, they create jobs for all of us – whether employed or fractional. Their employed C-suite will also need support from twinned fractional C-suite to avoid burnout and get everything done.

This is the real impact of fractional, the right help at the right time from the right people.

As the most scaled provider of fractional leadership services, with over 600 carefully vetted, supported and matched principals in the UK alone, Liberti's joined-up team solution offers something truly pioneering, impactful and affordable.

What makes a true fractional CxO?

"I don't think you're a true fractional executive unless you've held that role in-house before. Ideally, many times over. If your background is solely in consulting, you may have great knowledge, but you haven't really been there, day in, day out - owning the decisions, consequences and delivery from the inside. Consultants diagnose and advise from the outside, but fractional C-suite leaders get inside the business, drive the strategy and do the work.

"Doing the job is very different from advising from the outside. Without that lived experience, the work can slip into consulting style engagements branded as fractional. A 'fractional leader' is someone in-house, a permanent fixture. Not just there for a project but, critically, they have the key skills to implement too."

Sara Daw - Group CEO, Liberti Group
sara.daw@thelibertigroup.com

Fractional Growth

The economic importance of scaling mid-tier firms is growing as the cost & risk of bad hires rises, driving demand for flexible workforce and fractional C-suite solutions.

5.6M

FIRMS EMPLOYING UP
TO 50 PEOPLE GENERATED
£1.88 TRILLION
IN 2025 (ONS)

766,847

FAMILY FIRMS HAVE
CONTRIBUTED £1.6 TRILLION,
BUT ONLY 58% HAVE
BOARDS (SUI)

44,595

SCALEUPS IN THE UK THAT
CONTRIBUTE £2.19 TRILLION
TO THE ECONOMY (SUI)

60%

SCALE UP CEOs LOOKING FOR
FRACTIONAL EXECS TO FILL
GAPS IN STRATEGIC
LEADERSHIP (SUI)

400%

BAD EXECUTIVE HIRE
CAN COST UP TO
4 X SALARY (REC)

142,000

FRACTIONAL LEADER TITLES ON
LINKEDIN IN JAN 2025,
COMPARED TO 2,000 IN 2022.

61.4%

SMES USE FRACTIONAL GLOBALLY
& REPRESENT 90% OF GLOBAL
BUSINESSES (DATA INTELO)

\$24.7
BILLION

GLOBAL FRACTIONAL EXECUTIVE
MARKET WILL TRIPLE
BY 2034 (DATA INTELO)

BGF Q&A



Liberti Club spoke to Mark Nunny, an Investor at BGF, about the evolving role of fractional leadership in supporting businesses at different stages of scale.

LC: Where do you see fractional C-suite being most optimised amongst your clients?

MN: The businesses I work with have used fractional CFOs to rapidly upskill a finance team, act as a bridge to bringing in a perm CFO, and provide support in specific areas where an incumbent CFO is less experienced, such as in completing an acquisition. I've also seen them used to support a company to get 'investment ready' which has been particularly helpful in acting as a conduit between an investor and founder

We're seeing a broad church in how fractional talent is used. When we invest in businesses, we sometimes find that entrepreneurs have not invested as much in areas that are non-revenue generating, such as HR and talent.

For example, we may see situations where there are strong HR professionals, but they may lack strategic insight, so we look at fractional support around that.

Technology is another area that needs strategic capability, particularly around cyber security. Finally, we find that growing a sustainable sales team is a challenge for most businesses. We therefore see a lot of investment in fractional sales leadership, especially in B2B firms.

LC: Has your view of the role of fractional leadership changed, from enabling different stages of scale to being a longer-term part of the board?

MN: I think it's applicable over many evolution points in the business. When we invest, we're very conscious of

not overloading a board with permanent hires, as that's very expensive, so you can fill gaps between key senior hires with fractional support. This allows you to bring the right expertise in at the right time. We have found that, when you work with the right fractional leader, they can have a different frame of reference that the management team, which is valuable to the teams we back as they look to grow.

LC: Are you using fractional twinning to support in house members of the board?

MN: We are seeing this used more with senior functional leaders within the business, be it HR or technology or finance, to bring an alternative skill set, or complement the leader's existing experience because they are looking for an outside perspective.

LC: How is BGF supporting its portfolio businesses with its partner network?

MN: At BGF we ensure we provide a significant value creation offering to our portfolio. This includes helping our businesses to build effective boards through our Talent Network; access to operating specialists; and a community programme called Scale that connects a lot of the functional leads within our portfolio for events and to exchange information and share best practice.

To support this, we often work with wider people networks, from groups such as Liberti to individuals and non-execs, to enable the businesses we're backing to access the right people at the right time.

Mark Nunny - Investor, BGF
mark.nunny@bgf.co.uk

Finance led growth: **Clarity today, growth tomorrow**

From getting your financial house in order to improved cashflow and accurate forecasting, fractional finance professionals are enabling scale.

“YRH transformed our cash position in just 60 days. Finding £90k of unbilled work was just the beginning
– the systematic improvements they implemented mean we’ll never face that situation again.”

Paul Greenhalgh
Managing Director - SkillWise

27%

REDUCTION IN
ACCOUNTING COSTS

£120K

IMPROVEMENT IN
CASHFLOW POSITION
FROM CLARITY

12-18%

HIGHER PROFIT
OPPORTUNITIES FROM
MONTHLY VISIBILITY

10+

WEEKLY HOURS BACK TO
LEADERSHIP TO FOCUS
ON GROWTH



Building financial foundations for growth

Jennifer Raines - CEO Founder, YRH Finance Team
jennifer@yrhfinanceteam.co.uk | www.yrhfinanceteam.co.uk

When you're growing a business, your focus is on sales, product, customers, team. The finance function can get left behind. As decisions get bigger, the numbers get more complex, and the monthly clarity you need to make confident calls may not be available to you. Somewhere between £1 million and £5 million, a gap opens. You've outgrown what basic bookkeeping was ever designed to deliver.

With employment costs rising, capital allowances tightening, and Making Tax Digital rolling out from April 2026, the financial landscape for growing businesses is getting more complex. That makes financial visibility more important than ever. Not to react to these changes, but to plan through them with confidence.

"That's exactly the gap we fill. Since 2007, we've partnered with over 1,300 growing businesses to deliver the monthly clarity, operational control, and time to grow that transforms how they run their business."

Our part-time Finance Managers and Financial Controllers integrate with your existing team two to three days a week, delivering management reporting that drives profit improvement, cashflow visibility extending 13 weeks ahead, and the confidence that comes from knowing exactly where you stand. Our clients typically see 12-18% profit improvement, £50k-£120k in cashflow enhancement, and 10+ hours a week returned to leadership.

What makes this sustainable is how we work. We listen first to understand your business and aspirations. We design the right combination of support. We deliver with professional standards. And we evolve constantly as your needs change. Knowledge transfer is built into everything we do – we're building capability, not dependency.

With 100+ finance specialists across the UK, you get deeper expertise than any single hire, greater flexibility, and continuous coverage.

All the expertise of a senior finance team, none of the employment complexity. Why hire one person when you can have an entire finance team?

As part of Liberti, we connect you with complementary fractional support as you grow. When you're ready for strategic financial leadership, we work with the CFO Centre for a seamless transition. Through Liberti Club, you gain access to a wider ecosystem of trusted partners – from HR and marketing to sales leadership and professional services.

Proactive financial operations enhance your natural business instincts, reveals new opportunities, and accelerates your growth trajectory. The businesses that scale with confidence are those that invest in financial visibility ahead of need.



Finance management to strategic growth

Founded in 1952, Ainsley Signs is a family-run company based in Manchester that employs over 25 skilled professionals with a full fleet of vehicles for projects of any scale. With ambitions to grow further, Ainsley Signs looked to restructure their finance department and initially began working with Sadia Siddique, a Fractional Financial Controller from YRH Finance Team.

"When I started working at Ainsley Signs, I implemented a set of monthly management accounts, forecasting and budget to give them a bit more visibility on everything.

management information, we brought in Jonathan Cross, a fractional CFO from the CFO Centre in the North West, to look at business strategy and five-year plans.

It's good to be able to call on other partners who can support the client as their needs change."

"For a company like Ainsley Signs that haven't got the requirement nor the resource to employ full time CFO, being able to tap into not just me but the expertise of CFOs across the business is a great benefit," says Jonathan Cross. "As part of Liberti, I'm able to communicate with other CFOs to bounce ideas off, whether they've got experience of specific issues or contacts to help a client."

A third Liberti business was engaged to support Ainsley Signs' growth plans, with People Puzzles sourcing a new Managing Director, Dale Broadhead, to bring everything together to scale. "Having the experience and expertise of people like Jonathan and Sadia is fantastic," says Dale.

"If you're a small to medium sized business driving the next stage of growth it's 100% worth looking into, not just because it's cost-effective but it gives you clarity of how to achieve it."

www.signsmanchester.com



Success Stories



YRH delivered a £120k cash improvement in 60 days, identified & collected £90k of unbilled revenue, and reduced debtor days from 87 to 32 – a 63% improvement.

www.skillwise.org.uk

cra'ster

Monthly customer and product analysis revealed the top 8 clients drove 92% of revenue, which helped Craster achieve 10x growth and expand from 3 to 20+ employees in four years.

www.craster.com

Ebberns

YRH implemented cash management systems across three retail showrooms, saving 5-8 hours weekly and halving reconciliation time, with a range of efficiency improvements over a three-year partnership.

www.ebberns.co.uk



Over a four year partnership, YRH provided financial management support including cash flow forecasting that helped to secure a major supermarket contract and expand into Europe.

www.panrf.com

Your finance team. Without the employment.



100+ Part-Time Financial Controllers and Finance Managers
delivering monthly clarity, operational control, and time to grow.

100+
Finance
Specialists

1,300+
Businesses
Supported

12-18%
Typical Profit
Improvement

£50K - 120K
Cashflow
Enhancement

Too big for bookkeeping? Not ready for a Finance Director? Perfect for YRH.

YRH Finance Team

Part of the Liberti Group

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Check at: www.yrhfinanceteam.co.uk



Q&A

Liberti Club spoke to James Lammond, Commercial Director of YRH Finance Team about the evolving expectations of mid-tier firms as they get their financial house in order.

LC: How have YRH client needs changed over the last year, what are you seeing more demand for, and why?

YRH: The biggest shift is that business owners want forward-looking financial intelligence, not just day to day record-keeping and annual accounts. A year ago, most conversations started with "we need help with our management accounts." Now they're starting with "we're planning to grow, we need the visibility to do it with confidence."

Cashflow forecasting is the top priority. Businesses want 13 to 26 week visibility so they can make decisions from a position of strength rather than reacting month to month. We're also seeing demand for investment-ready reporting. The common thread is ambitious businesses moving from annual accounts to monthly clarity.

LC: How is YRH helping family & founder-led businesses to get their financial house in order?

YRH: We provide part-time Finance Managers and Financial Controllers who integrate with the business's team two to three days per week. The expertise of a highly capable and experienced finance hire without the £70k+ salary, the 30% on-costs, or the 3-6 month recruitment process. Our proven Best Practice blueprint

evolves as our clients' businesses grow, so we design out the failure points of growth before they cause a problem. And our four-stage approach - Assessment, Design, Delivery, and Embedding - ensures improvements are sustainable, not dependent on us. Knowledge transfer is built into everything we do, so clients gain capability while we implement. When we step back, the expertise stays.

Being part of Liberti is a real advantage. When a client's needs evolve, we connect them with strategic finance leadership through the CFO Centre, or with HR, marketing, or sales expertise through the other Liberti businesses.

Ainsley Signs is a perfect example. They came to us through the CFO Centre, who they weren't yet ready for, so we built their financial foundations. When we knew the business was ready for that strategic support we re-introduced the CFO Centre back to them, at exactly the point they needed them. That's the Liberti ecosystem in action.

James Lammond - Commercial Director, YRH Finance Team
james.lammond@yrhfinanceteam.co.uk



Finance led growth: **Transformational Leadership**

From strategic planning for investment, scale or exit to managing Mergers & Acquisitions, fractional finance leaders are transforming businesses and lives.

“Adrian has enabled us to have greater visibility of our performance and profits, which has proved essential to our decision making. We’ve noticed the impact of Adrian’s work throughout the business, from forecasting to staff morale and beyond. He’s even generated a significant amount of sales for us!”

Tom Oliver

CEO - James Oliver Conservatories

750+

HIGH CALIBRE CFOS

18

COUNTRIES

1320

ACTIVE CLIENTS
GLOBALLY



The evolution of fractional finance leaders

Jamie Mills - CEO UK&I, The CFO Centre
jamie.mills@cfocentre.com | www.cfocentre.com

For many years, The CFO Centre's core clients have been mid-tier businesses, with turnover between £2m and £50m, but we are now also seeing new demand from smaller companies and large corporates for fractional services. This has been driven by greater awareness of fractional as a more affordable way to bring strategic finance capability into smaller firms, and larger businesses enhancing their inhouse capability with a product we refer to as the CFO's CFO.

Being able to provide opportunities to work with a wider spectrum of businesses is helping us attract more of the best fractional CFOs as well, providing more choice and variety in the make-up of their portfolio.

“Our product offering is expanding and evolving, to address the increased demand with businesses at various stages in their journey.”

When we start with a smaller client, we can position and migrate them through their growth journey with an always adapting product offering, delivering the entrepreneurial journey to the desired end point. Whatever the size of client business, the fractional CFO we introduce is one of over 350 in the UK, and over 750 globally, who they can tap into for advice – so hundreds of experts for the price of one.

The partner ecosystem we've built over the years includes a wide range of business service providers that have been recommended by our growing client community, from banking and corporate finance to accounting and insurance, to introduce the best solutions and experts when they're needed. All of this has enabled us to build deeper client relationships and truly map out and deliver their needs.

I'm often asked what a great fractional CFO looks like because we only take one in every hundred who applies to join us. Having exceptional technical knowledge and varied experience is the bare minimum. We look for emotional intelligence, empathy with founders and their pressures, and the ability to quickly build relationships with multiple clients. Comparatively few CFOs have this combination.

There has been a continuing trend for CFOs to deliver more C-Suite services as a strategic and commercial leader. While many are worried about the impact of AI on businesses and the roles for people within them, we see it as a great enabler for the CFO role. Not just generating data and creating reports, but being able to direct research for the most meaningful insight and accurate reporting which can then form the basis for growth decisions. CFOs must have a holistic business understanding and perspective to deliver full commercial value.

Looking to the future, continued dissatisfaction with the cost and risk of traditional employment models, for both CFOs and businesses, will drive further demand for fractional. We're seeing huge growth opportunities in supporting full-time corporate CFOs as the scope of their remit expands. Even the best CFO on their own can't possess all the skills required for such an increasingly broad role. We can provide a team of people with very different skills and experiences to cover all bases.

While competition is definitely growing, we have an abundant mentality and believe there's room for everyone in the fractional marketplace. Having said that, there are few who can offer the scale of our service, our regional coverage and the breadth of our partner ecosystem to genuinely change lives – for our clients, their employees and their families.



Fractional CFOs are helping leadership teams solve complex challenges, unlock new opportunities and build stronger financial foundations.

Funding growth



For over 30 years, family-run firm MAN Commercial Protection has delivered security services across a diverse range of businesses, achieving year-on-year growth and building a loyal customer base.

CEO Iain McCallister set his sights on achieving £100m turnover and, while he knows the security industry inside out, recognised that he needed specialist expertise to keep expanding the business. Iain managed the transition from small to large business with The CFO Centre, when Caroline Dodds became MAN's fractional CFO in 2012.

The priority was on raising funds because the business was trading beyond its overdraft and didn't have the right funding structure in place to support Iain's ambitious growth plans. They didn't have enough focus on cash collection, so Caroline introduced tight credit control processes and arranged a 'beauty parade' of alternative funders.

Since then, Caroline has worked with Iain and his team to build a finance team, implementing processes to provide the right timely management information, establishing a £15m funding facility, and identifying and assessing acquisition targets. This rigour has enabled the business to grow from £5m to £60m in turnover, with a more dedicated, professional and scalable approach to finance.

Iain describes Caroline as his trusted advisor and recognises that she provides a critical balance to his

entrepreneurial style of working. He makes intuitive, optimistic and passionate decisions from the heart, whereas Caroline is maybe more considered and more reserved and does the necessary due diligence to support Iain's decision making. This has really paid off in their various pursuits of acquisition targets, with Iain able to make an informed decision based on Caroline's data.

Iain feels that Caroline has educated him over the years on how to build a positive relationship with his bank, how to interpret management information and the important role of forecasting. He trusts and values her opinions, knowing she always has the best interests of the business at heart as well as the numbers to back up her thinking.

"You can't be the best at everything in business so surround yourself with experts like The CFO Centre. The biggest thing in business is making sure you're going to get paid. This is the peace of mind, ultimately, that Caroline brings us."

www.mancommercialprotection.co.uk



55M

TURNOVER INCREASE

15M

FUNDING FACILITY

16

YEARS OF WORKING TOGETHER



Preparing for exit



Scholarcy, an EdTech startup, knew the business would be in a better position to transform academic study if it was backed an established industry player. Since the co-founders had no previous mergers and acquisitions experience they looked to The CFO Centre for guidance and support in taking the business to the next level of its evolution.

London-based CFO, Marcos Theodosiou, was the perfect expert to help them achieve this, with experience of multiple mergers, acquisitions and exits across many sectors, including tech startups.

An initial strategic review was undertaken to explore the growth plan for the business and to understand how prepared it was for the external scrutiny of an exit event. Working as one team, Marcos and the co-founders agreed a detailed plan of action, which was initially focused on upgrading financial reporting and planning tools.

Scholarcy's reporting and planning framework was designed with investors in mind, which provided a higher level of clarity and helped the co-founders to assess the value implications of their decisions.

Over the next 12 months, Marcos supported the business to prepare all the materials needed to confirm an exit event, including an Information Memorandum and a data room with supporting documentation, anticipating the needs of potential investors.

With the business already on a highly successful trajectory, the co-founders felt confident in initiating the sale process. Following a successful introduction to an M&A advisory firm by The CFO Centre, Scholarcy's robust exit preparation was key in helping the selected buyer to complete due diligence and execute the deal in record time and to maximise exit value for the founders.

"The CFO's Centre's journey with Scholarcy proves that a business doesn't need to be struggling or experiencing pain to benefit from bringing in a fractional CFO," said Ryan Oates, Divisional Director. "The value we provide to our clients doesn't always take the form of reports or forecasts, it's also the confidence that comes from expert guidance and preparation. We were able to provide this at a critical time and this proved to be transformational for Scholarcy's co-founders."

"We were immediately impressed with Marcos' pragmatic, friendly approach and experience," said Emma Warren-Jones, Co-Founder of Scholarcy. "We wouldn't have got there without the faith that The CFO Centre had in us and the impeccable service they provided."

www.scholarcy.com

16

MONTHS OF CFO
CENTRE SUPPORT

2

CO-FOUNDERS
SUCCESSFULLY
EXITED

1

BUYER WHO
COMPLETED IN
RECORD TIME

Find the right support for your business
with the world's #1 fractional CFO
provider*

Specialist services require a specialist team

- ✓ Exit planning
- ✓ Improve cash flow
- ✓ Profit improvement
- ✓ Scaling up
- ✓ CFO's CFO – supporting in-house CFO's
- ✓ Risk Management consultancy
- ✓ Financial Management consultancy
- ✓ Funding



"If a business is considering a fractional CFO, my advice would be to try it because it's very likely to add value."

Iain McCallister
CEO, MAN Commercial Protection

Book a confidential
discovery call

750+

fractional CFOs

#1

fractional CFO provider*

18

countries

*Based on number of CFOs globally and volume of countries trading 2026



Q&A

Why is Liberty's team of regional directors & partners so important?

LC: Why are networks and partnerships such an important part of the CFO Centre's solution?

MM: The CFO Centre is part of the Liberty Group, an organisation at the forefront of delivering fractional C-suite expertise to the SME sector. Each of our sister businesses bring a unique network of trusted partners, and together, we enhance how we serve SMEs by fostering a collaborative, integrated ecosystem of professional services.

We always say that you access way more than a fractional CFO because you get the benefit of their network and shared knowledge across over 750 CFOs globally. You also get access to your Regional Director's local contacts and their national network across all of our sister businesses. Our principals and Regional Directors across the Group are able to recommend partners across a range of business services that our clients have really valued.

These include insurance advisory business Partners&, both a partner and a client as they have one of our CFOs supporting them in their M&A growth strategy. Allica Bank has helped some of our clients to access interest rates that have effectively covered the cost of a fractional CFO for a year.

These partners aren't just providing services to our clients; they're promoting the impact of fractional to theirs as well. It was great to see an editorial by Allica Bank and AccountingWEB on how SMEs are adapting to talent shortages, regulatory complexity, and economic uncertainty by embracing flexible, strategic financial leadership. It's a timely reflection of what we see every day at The CFO Centre. Fractional CFOs are helping businesses navigate funding rounds, restructuring, expansion, and digital transformation.

Matthew Mills - CRO, The CFO Centre
matthew.mills@cfocentre.com

LC: Why are Regional Directors an important part of Liberty's fractional solution?

JM: Regional Directors are fundamental to how our model works. For most CFOs, the relationship with their RD becomes the most critical partnership they have within the business. It's built on trust, mutual understanding, and a clear sense of each other's goals, priorities and working style. When that relationship works well, everything else flows from it.

The RD role spans the full lifecycle of Finding, Winning, Keeping and Team. It's a big differentiator for all of our sister businesses within Liberty. When a new CFO joins, their priority is simple: get busy with the right clients. RDs match CFOs to clients that will enjoy working together, where there's strong alignment, clear need and long-term value.

As time goes on, the RD's relationship with the CFO evolves. They become increasingly focused on client value, retention and bringing the wider team concept to life, ensuring each CFO feels connected, supported and part of something bigger than their own portfolio.

It's a multifaceted role, and that's why great RDs are rare. Alongside their sales responsibilities, they build trusted relationships, run events (often in partnership with RDs across Liberty), bring business leaders together, share market insights, and help onboard and support new principals when they need guidance or challenge. One principal summed it up perfectly: "When I get five spare minutes, I call my RD first, then my partner". That tells you everything you need to know about the impact of a great Regional Director.

Joseph Mills - COO, The CFO Centre
joseph.mills@cfocentre.com

PARTNERS^Q

Q&A

Jonathan Miller, Chief Client Officer at Partners&, highlights key risks that SMEs should be managing and how to build resilience for scale.



LC: Why should resilience be an important priority for scaling SMEs?

JM: Typically operating with leaner teams, tighter cash buffers and less room for error, even small disruptions can derail momentum in scaling SMEs. Building resilience strengthens the ability to manage the risks that come with growth, from cashflow pressures and talent shortages to supply chain shocks and volatile market conditions. A resilient business is more attractive to investors and better equipped to capitalise on new opportunities.

LC: What are your most in-demand solutions at Partners&?

JM: We're advising clients on solutions that build resilience across the 21st century risks in business today and helping them to prevent, mitigate or transfer risk across every part of their world to help them deliver their plan with confidence.

We're seeing growing demand for support in the following areas:

- **Cyber risk & vulnerability assessment** – providing an outside-in view of how a cybercriminal would target their business and protecting vulnerabilities.
- **Employee attraction and retention** – this increasingly involves supporting physical, mental and financial health & wellbeing, with bespoke employee benefits programmes now critical in the war for talent.
- **Business continuity & tolerance for disruption** – working with businesses to plan for the unexpected, equipping clients to withstand operational shocks and critical supply chain interruptions.
- **Credit insurance & economic insight** – protecting cashflow by safeguarding against late or non-payments and enabling safe growth through informed credit decisions.
- **Shareholder & key person protection** – safeguarding leaders both personally and professionally in the event of the loss of key individuals whose absence could materially impact the business
- **Risk management services** – including health & safety, business continuity planning, property surveying and claim defensibility support.
- **Mergers & acquisitions advisory** – increasingly in demand among clients pursuing buy-and-build strategies or preparing for their exit and retirement.



LC: Why are partner ecosystems important enablers for growth?

JM: As a next generation insurance advisory business, we take a holistic approach to risk, looking beyond traditional insurance to deliver solutions across a client's wider risk landscape. Our ecosystem partners bring deep expertise exactly where it's needed, enabling us to extend the level of advice we provide. Clients gain timely access to the right expert as their business evolves, tailored interventions aligned to their priorities, and access to a trusted and rigorously vetted network. It enables us to continue to support clients beyond just insurance – the essence of what we mean by Partners And.

LC: Why are fractional C-suite solutions an important part of your partner ecosystem?

JM: For our own growth through M&A, it's given us access to seasoned specialists with experience in similarly high-growth environments, increasing our bandwidth and confidence during periods of integration and rapid scale. It's freed up internal leaders while still retaining the depth of expertise needed for complex areas such as financial due diligence on acquisitions and largescale internal system transformation projects.

For our clients, fractional C-suite leaders deliver high-calibre executive expertise at a fraction of the cost of a fulltime hire and immediate ROI, closing skill gaps that slow decision-making, providing mentoring for rising leaders, and offering specialist insight to prepare for investment or exit.

LC: How can founders get the most value from advisers like Partners&?

JM: It begins with deep discovery, taking the time to fully understand their business so our advice is grounded in real insight. The strongest outcomes come when our team is treated as an extension of the founder's leadership, where conversations are open, honest and willing to explore the challenges they face. In our experience, longterm, collaborative relationships always outperform shortterm transactions, because it's the relationship itself that unlocks the greatest return.

To find out more about how to manage risk with Partners& email jonathan.miller@partnersand.com

Growth doesn't fail businesses

Decisions made under pressure do

For founders and CEOs of ambitious businesses, growth is about driving momentum while managing the complexity that comes with scale.



Blick Rothenberg have been a great support to our business, from our initial start up until the present day. They understand the challenges and opportunities we have faced and have expertly helped us navigate these. **Jo Johnson-Mathers, Founder, Cupcake Clothing**

As business leaders, growth is real and accelerating but structure, incentives, international expansion, funding and future exit planning often lag behind ambition.

At Blick Rothenberg, we work with founders and CEOs at critical inflection points - when the business is scaling, leadership pressure rises and the right decisions create momentum rather than friction.

Our Partner-led approach helps leadership teams:

- Anticipate challenges before growth decisions become hard to unwind
- Balance commercial pace with personal and business risk
- Ensure accounting systems produce clear, efficient management insight to help decision-making

Our role goes beyond compliance services and technical advice. We help founders and CEOs make confident decisions that support sustainable growth - without creating problems further down the line.



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Q&A

Liberti Club talks to Malli Kini, Partner and co-lead of Entrepreneurial Services at Blick Rothenberg about growth enablers for mid-market businesses.



LC: Why are mid-market companies so important to the UK economy?

MK: Mid-market businesses are genuinely the engine room of the UK economy, employing over ten million people and with a combined turnover equivalent to more than half the value of UK GDP. Research from the CEBR suggests mid-sized firms have been growing at roughly three times the rate of the wider business population over the past five years and are projected to contribute around £745 billion in gross value added by 2028.

LC: What are the biggest barriers & enablers to growth?

MK: The biggest barriers remain an increasingly complex tax and regulatory environment, access to growth capital, and the cost of employment - particularly after recent rises to employer National Insurance contributions. The enablers are tax incentives that genuinely reward risk-taking, access to skilled talent, and the confidence that comes from stable fiscal policy. Too often, policy changes arrive with very little lead time, making it extremely difficult for businesses to plan.

LC: Where do fractional C-suite solutions have the greatest impact?

MK: For businesses between roughly £5 million and £30 million in revenue - or pre-revenue, but scaling rapidly - a full-time CFO or COO may not yet be justified, but the strategic thinking those roles bring is essential. Fractional solutions bridge that gap and, importantly, they complement the work of external advisers because they ensure there is someone internally who can act on the advice and drive implementation.

LC: Why are partner ecosystems and peer networks important growth enablers?

MK: No single adviser can solve every problem a scaling business faces. The real value comes when your accountant, lawyer, banker, and other trusted partners are connected and communicating. Networks like Liberti Club add another dimension entirely, helping founders and fractional professionals learn from each other.

LC: What are your most in-demand services for mid-market and scale-up businesses?

MK: We work with over 1000 mid-market businesses directly. Through our membership of Allinial Global, a network of more than 260 independent firms across over 100 countries, we can support clients wherever their growth takes them.

Our most in demand services include outsourced accounting, payroll, audit, corporate tax compliance and advisory work, transaction services around acquisitions and disposals, R&D tax relief, employee share incentive plans, shareholder structuring and future planning as well as international expansion support. Increasingly, we're seeing demand for global mobility advice as businesses move people across borders more frequently.

UK businesses expanding into the US, and US firms coming to the UK is a real area of focus for us. We have a dedicated team of dual-qualified US/UK tax professionals who advise on everything from entity structuring and state-level tax obligations to employment tax and personal relocation matters.

We also support over 100 overseas companies a year entering the UK market. Our CEO Nimesh Shah was recently appointed Chair of the Global Executive Board at Allinial Global, which underlines our commitment to international connectivity at the highest level.

LC: What's on the horizon that scaling SMEs should prepare for this year?

MK: My advice would be to use this year to get your house in order - stress-test whether your corporate structure is fit for purpose and review your employment costs. Work with your advisors to stay on top of amendments to FRS 102, bringing significant changes to revenue recognition and reported numbers.

For those with international operations or ambitions, get compliance advice if you're putting people on the ground in a new tax jurisdiction.

malli.kini@blickrothenberg.com

Marketing led growth: **Planning for success**

Whether you're growing market share, or expanding into new markets, fractional marketing leaders are bringing enterprise-level expertise into scaling SMEs.

"Hari Farzin, our fractional CMO, is a force of nature. With a focus on the end objective, she works at pace and gets things done.

I have and will recommend her to other ambitious businesses who are looking to propel their growth."

Kerr McEwan

Founder and MD - M Squared

100

FRACTIONAL MARKETING
DIRECTORS / CMOS
ACROSS THE UK

1800+

YEARS COLLECTIVE
MARKETING KNOWLEDGE
AND EXPERIENCE

1400

UK SMES HELPED
SINCE 2011



Why ending 'random acts of marketing' is the key to sustainable growth

Lucy Hogarth - Founder & CEO, The Marketing Centre
lucy.hogarth@themarketingcentre.com | www.themarketingcentre.com



For many growing businesses, the real challenge is not generating interest but creating the structure that allows marketing, sales and operations to work together effectively.

The strongest message emerging from our most recent CMO Outlook Report for 2026 is that sustainable growth this year will not come from doing more marketing, but from building the right foundations for marketing to work. Businesses that grow confidently understand their customers clearly, have systems that provide reliable data, and run marketing as a continuous function rather than a sporadic activity. These businesses make better decisions, spot opportunities earlier and avoid the costly peaks and troughs that come from reactive action.

In contrast, many leadership teams recognise a familiar pattern: bursts of marketing activity that generate short-term momentum, followed by periods of inactivity when attention shifts elsewhere in the business. Developing a clear marketing plan is often the starting point. This requires alignment with business goals, effective use of budget and the ability to adapt as markets change.

Research we conducted in 2024 showed that 64% of SMEs reported operating without a formal marketing plan, and fewer than a third said they were generating enough leads to meet their growth objectives. Without this structure, marketing often becomes reactive, making it difficult for leadership teams to predict performance or scale growth with confidence. The cost of not planning properly is high, with 60% of digital marketing budgets wasted due to inefficiencies in execution and a lack of proper planning.

A well-constructed marketing plan provides a framework that connects marketing activity directly to business objectives, with clear priorities, budgets and milestones. For many organisations, the challenge is not recognising

the need for structure but having the leadership to put it in place. Marketing typically spans multiple channels, teams and external partners, making it difficult to coordinate activity and measure what is truly working.

This is where fractional CMOs can play an important role. By providing c-suite level marketing leadership on a part-time basis, they help businesses create and implement a clear marketing strategy while remaining closely aligned with wider commercial priorities.

An experienced fCMO brings both strategic oversight and practical direction. They help businesses identify where marketing investment should be focused, prioritise activity that drives measurable results and ensure that decisions are supported by data and insight.

They can also help diagnose the underlying challenges holding marketing performance back, whether that is demand generation, positioning, conversion or internal capability.

Choosing the right fCMO usually starts with a conversation about where the business is today and where it wants to go next. The Marketing Centre brings together 100+ fCMOs across the UK, each with senior marketing leadership experience gained within major corporates and high-growth organisations, combined with extensive experience supporting SMEs and mid-market businesses. This depth of experience spans a wide range of sectors and specialisms, enabling businesses to be matched with a fCMO whose experience and leadership style align with both their commercial needs and company culture.



Growing high value contracts



Brown Recycling, a fifth-generation family-owned total waste management and recycling business established in 1926, needed help to get growth back on track after a period of steady expansion outside of their core market of Staffordshire.

After Mitch and his sister Dominique Brown were appointed Co-Managing Directors in early 2023, they found a fractional CMO from The Marketing Centre whose strategic marketing transformation led to 10% revenue growth, 10 new high-value clients, and major sustainability awards.

Jane Nugent joined in August 2023 and was struck by how Brown Recycling had built a loyal customer base with excellent service, had such a strong commitment to sustainability and a company-wide tradition of supporting charities and community initiatives, but none of this was being promoted to the market.

Jane created a clear, defined commercially-led value proposition to set Brown Recycling apart from their local and national competitors, built an aligned, fit-for-purpose website showcasing their heritage and community engagement; worked with sales to identify a list of 75 high value contracts to target; developed an inhouse marketing resource; and managed their agency to ensure full value for money.

Jane's strategic guidance, brand focus and hands-on support led to Brown Recycling winning several awards, including an EcoVadis Bronze ranking for their sustainability performance, which placed them in the top 35% of global businesses assessed by them in 2024. This not only raised their profile and standing regionally and across the waste management sector, but helped them achieve double digit growth and win new high value contracts.

Plans are now in hand to mark the centenary of the business in 2026 with continued growth of the business across Staffordshire, Cheshire, the Midlands and beyond.

"From what I was expecting to now has exceeded all expectations," said Mitch Brown, Co-Managing Director of Brown Recycling. "Full credit to the expertise of Jane for pushing us forward and giving the business the credibility it deserves."

www.brownrecycling.co.uk

10

NEW HIGH VALUE
AND LONG-TERM
CONTRACTS

10%

GROWTH IN
REVENUES

TOP
35%

IN ECOVADIS
SUSTAINABLE
BUSINESS
RANKINGS



Doubling pipeline growth



Isogenica, a Cambridge-based biotech pioneering synthetic VHH antibody discovery, went from passive sales and virtually no pipeline to global CRO partnerships, multiple biotech client wins, and the largest commercial pipeline in its history with support from The Marketing Centre.

In mid-2024, after acknowledging that sales were reactive, marketing was non-existent and growth had stalled, Isogenica was matched with Stephen Rumbelow, a fractional CMO, to design and execute a marketing strategy without adding pressure to the R&D team.

Understanding that the challenge was communication, not capability, the solution was designed around clarity of message, leading on speed, flexibility, and partnership grounded in science; focus on the key decision-makers in US biotech (R&D Directors, Heads of Discovery) who choose partners; and purposeful content to guide decisions, provoke action and convert.

This was under-pinned by sales enablement structure to track and convert leads, from better optimising Isogenica's Zoho CRM to introducing a clear handover process between marketing and sales, ensuring every marketing-qualified lead (MQL) was progressed to sales-qualified (SQL) stage. Stephen also supported the recruitment of a sales-oriented Director of Business Development with additional experience in Marketing,

giving greater ownership of the pipeline to continually improve targeting and lead quality.

By August 2025, twelve months into execution, Isogenica had the largest sales pipeline in its history, over 100 marketing-qualified leads (MQLs) generated, 100+% growth in revenues, four times the number of active clients, and new CRO partnerships signed, including strategic relationships with Charles River, Axxam and Cube.

"In January 2024, we had a small number of satisfied long-term customers but very little new business coming in," said Marion Cubitt, COO, Isogenica. "I identified Marketing as an area for improvement. On a personal recommendation, I contacted The Marketing Centre and have not looked back. Stephen has provided the guidance to create a solid strategy, and helped me to communicate internally why it is worth putting some money in your Marketing budget.

I am now confident that the foundations we have built are solid, not just a quick fix, and ready for scaling up to match the growth targets for our business."

www.isogenica.com



Supercharged Fractional CMO services for real business growth

the
marketing
centre

The UK's #1 Fractional CMO provider.
Human led. Powered by AI.

100+ senior growth leaders | 1,400+ businesses supported | 15+ years of proven results

Our Growth Leadership System

Our Fractional CMOs are backed by an entire growth system: a connected framework that aligns strategy, leadership and execution to drive measurable, sustainable growth.

Senior marketing leadership, reimaged for growing businesses.

LEADERSHIP STAGES

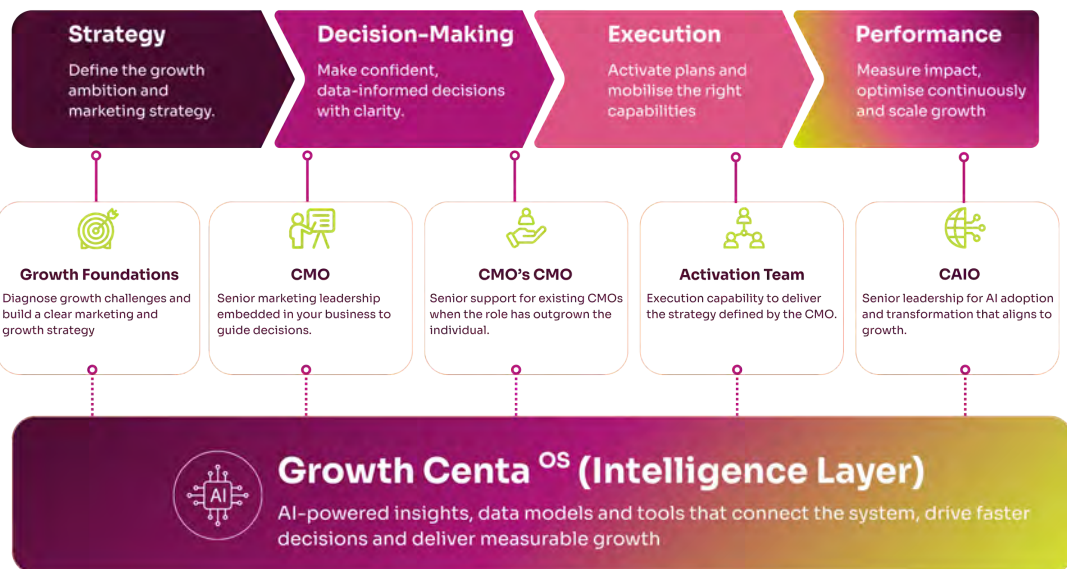
The end-to-end growth journey, aligned at the leadership level.

LEADERSHIP SERVICES

Specialist leadership services that power each stage of the growth journey.

INTELLIGENCE LAYER

The intelligence layer that connects, informs and accelerates everything above



When marketing isn't delivering, it's often because:

- No clear marketing strategy
- Agencies delivering activity but not results
- Internal team lacks senior leadership
- Lead generation isn't producing quality opportunities
- Messaging and positioning are unclear
- Business growth is outpacing marketing capability

“We wouldn't get to where we got to in a period of 6 to 9 months without The Marketing Centre.”

Robert Colver
MD, Arrow Industrial Group

Talk to a fractional CMO about your growth plans



020 8012 8281



info@themarketingcentre.com

Scan the code to
book a discovery call



Part of the Liberti Group

www.themarketingcentre.com



Winning clients & awards

Co-founded 10 years ago by directors Ewan Ferguson and Chris Templeton, FullProxy is a Glasgow-based cybersecurity consultancy providing advanced optimisation, strategy and technical partnerships to businesses throughout the UK. Despite their technical know-how, they needed help demonstrating value to drive growth.

FullProxy didn't have any senior in-house marketing resources, had not previously invested in strategic marketing, and a marketing agency was not providing demonstrable value. Cold calling and tactical outreach were ineffective, despite rising volumes of cyber-attack dramatically increasing demand for trusted advisors. FullProxy's brand positioning as an undifferentiated tech reseller wasn't promoting its higher value strategy and consultancy services.

The Marketing Centre's Fiona West joined FullProxy as a Fractional CMO in March 2023. She created coherent brand messaging based on strategic insights, provable expertise and premium technical partnerships; built a thought leadership campaign to cement its reputation across Scotland and the UK; and created an annual strategic marketing plan with a tightly managed budget and KPIs to give directors confidence and visibility.

In 2025, FullProxy was shortlisted as a finalist for Cyber Security Company of the Year at the Scottish Cyber Awards and was named Westcon F5 Partner of the Year.

Fiona also referred a Fractional Sales Director from sister Liberti business KissTheFish to align sales goals and marketing strategies with an affordable C-suite and designed an implementation plan to better optimise Hubspot to enrich data and improve conversions. A website refresh, redesigned to look more consultative and less techy, resulted in a 43% uplift in website traffic growth.

Commenting on a revenue increase of 135% from 2024 to 2025, FullProxy CEO Ewan Ferguson said: "It's been transformational. Those initial meetings with The Marketing Centre were so eye-opening. There was almost immediate benefit to us.

The fractional system gives us access to top-level skills from enterprise-level companies and brings them to the SME space, and we've benefited hugely."

www.fullproxy.com



135%

REVENUE GROWTH
FROM 2024 TO 2025

43%

GROWTH IN
WEBSITE TRAFFIC

TECHUK TOP
200
GROWING
COMPANIES 2024



Q&A



Fareeda Jaleel, Fractional CMO, The Marketing Centre explains how her clients are managing the risks and maximising the rewards of AI

LC: What is the general level of adoption of AI amongst your clients?

FJ: Whether it's large businesses, small or mid-tier businesses, there is still an overall sense that AI is a magic bullet; so they need help in understanding where it will have an impact, and how it can be implemented into existing systems and processes. There is also an assumption at leadership level that everyone knows how to use it, or is willing to embrace it. There is still a lot of fear about AI.

From a marketing perspective, it's understanding where not to cut corners to avoid risk. For example, not investing in a writer to manage costs and using content from ChatGPT for lead generation activity that is probably plagiarised or the same as everyone else's, which impacts reputation and differentiation.

LC: How are you helping clients to optimise AI?

FJ: To make the most of AI you need to get the right quality of data in the right place, so I'm helping clients to do prioritise the right areas and do this in a structured way.

For example, updating their existing CRM instead of spending money on new tools to maintain and develop customer relationships. I'm also helping them avoid falling foul of mis-using data that might get them blacklisted.

LC: How is The Marketing Centre supporting clients more broadly around AI?

FJ: We run events on AI and our network of CMOs stay up to date with new courses and qualifications on AI. We have a framework in The Marketing Centre to assess the level of AI competency in the client organisation, whether it's at a senior level or at an implementation level with the team. This includes an assessment of the existing MarTech stack to see what AI tools are available within it, speaking to the different providers and then putting a plan in together to optimise it. We look at implementation and project management capability to consider impact on the customer journey.

LC: With more investors and acquirers prioritising data quality and AI capability, how are you helping clients prepare for exit or investment?

FJ: I wear both a marketing and a commercial hat as a fractional CMO, but we expand our support by bringing in different subject matter experts from our partner ecosystem. For example, the CFO Centre for a strategic finance perspective, The Legal Director for data compliance and AI regulation, or Freeman Clarke for cyber risk management and a CTO view. The Marketing Centre on its own is not a one size fits all, but as part of Liberti it's certainly a one stop shop for everything you will need.

fareeda.jaleel@themarketingcentre.com



Q&A

Andrew Milbourn, CEO of Kiss The Fish, shares insights on how he is helping clients to use AI to improve sales success



LC: How are Kiss the Fish clients typically using AI to improve sales?

AM: The majority are under £5m turnover businesses and have been slow to adopt the CRM plugins and new AI tools that organise selling. Data quality and quantity is the most common barrier to optimising AI, but also the biggest enabler of sales once the CRM is being used properly. AI sales efficiency tools tend to come further down the line as we're helping them with strategy, process and training to get the basics right.

LC: How is better data moving the dial on AI-enabled sales?

AM: AI speeds everything up and organises data, but the data has to be usable – not just up to date and accurate but with insight about clients and prospects. One of our clients, an £11m turnover business, didn't even have visibility of who their most and least valuable customers were, or even how many they lost last year and why. We helped them to understand the data they needed to more accurately set targets on retention and growth for better forecasting, and now we're working on how to achieve those targets. In sales, the speed only happens when you get good data and salespeople understanding that it's not optional

LC: How is Kiss The Fish using AI to support clients?

AM: For us, the AI relevance is in the coaching piece. We have built a learning solution for sales using Realtalk, the AI-powered role-playing platform. We have written up all of the simulations of what a sale looks like, what's good and bad, with decision paths so each choice has consequences to learn from. Training for salespeople has to be interactive, and this helps people understand where they went wrong and how to properly critique a sale.

You can create various client avatars, whether it's an emotional person, a tough person, someone who thinks you're too expensive, or someone who's heard bad things about you from competitors. The beauty of it is that it will score you, so every time you get something wrong and improve it in the next role play your score improves. As an interactive coaching tool available anywhere at any time, it's far more efficient than trying to do face to face.

This is coaching rather than being a fractional Sales Director, developing someone's sales ability rather than sales efficiency. The efficiency from better use of AI will only come after good training, process and data.

andrew.milbourn@kissthefish.net

Sales led growth: **A catalyst for scale**

From better bids to higher margin clients, fractional sales leaders are fine tuning the engine of growth with the best combination of strategy, coaching and execution.

“Our Fractional Sales Director has helped us in more ways than we thought possible when we set out on our growth journey, especially with accountability, productivity, structure, coaching and most importantly of all, direct sales results. Our sales pipeline has doubled and currently tracking at a 36% increase in the first year.”

Luke Pollard
MD - Actionpoint



kiss the fish

Adapting sales and transforming results

Andrew Milbourn - Founder & CEO, Kiss The Fish
andrew.milbourn@kissthefish.net | www.kissthefish.net



We're operating in one of the most unpredictable sales environments in years, so businesses need sales leaders who can build trust and confidence in uncertain times.

Coming out of 2025, buyers are cautious, overwhelmed, and emotionally exhausted by decision-making. Buyer fatigue is the exhaustion that comes from being constantly sold to, asked to commit, or faced with too many options during uncertain times. Every decision feel riskier. There is a growing fear of making the wrong decision, with hard won budgets, reputations, and careers on the line.

This means buyers aren't saying no, they're saying nothing.

We have helped clients by ditching the pitch, and starting with curiosity; because in fatigued markets, leading with features and benefits backfires. Instead of opening with, "Here's what we offer," we start with: "What's the biggest pressure you're under right now?"; "What's changed in your buying process this year?"; and "Where are you hesitating and why?"

Most buyers already know why they should act, but they're struggling with when. Urgency in 2026 isn't about pressure, it's about perspective. For example: "Based on what you've told me, here's what doing nothing could look like in six months." Reframe the risk and make the cost of inaction clearer than the cost of action.

The best salespeople build credibility with insight and sector context, so clients feel that they're learning from

them. Every decision is ultimately emotional, so we help salespeople to share stories, not just stats. As more people try to leverage AI to reach more prospects, the future of selling is human. Clarity, care and curiosity, not louder tactics.

If your sales function needs clarity, structure, accountability and momentum, a fractional model gives you all the experience of a full-time Sales Director, without the cost or long-term commitment. Our current clients are seeing average sales growth of 20–30% per year, with some scaling by 50–60%. Our Fractional Sales Directors are based across the UK from Devon to Scotland, so we can match by region as well as market or sector.

A great Sales Director doesn't just manage sales, they transform it. For most companies under £50 million turnover, a full-time Sales Director simply isn't necessary. Our typical clients are founder-led businesses who need someone to 'own sales', SMEs with no senior sales leader in place, companies growing fast but losing consistency, businesses with a sales manager who needs strategic support, and organisations who want board-level sales leadership without the £120k+ salary.

A fractional Sales Director is more than a consultant, they're a catalyst for transformation, not just improving sales performance, but changing behaviours, systems, and results.



The Neuroscience of trust

At the end of 2021, the CEO of a UK surgery supplies business based in the West of England, presented a new challenge to Kiss The Fish. Lockdown meant the sales team couldn't visit clients, the biggest driver of sales. Telemarketing failed because they had no means of identifying the names or email addresses of their target audience, and contacting doctors' surgeries was (and still is) impossible by phone.

"The market was tougher than most due to doctors' surgeries being under enormous pressure from the threat of spreading disease and making people ill rather than helping those in need," said Kiss the Fish CEO Andrew Milbourn. "Selling into that environment needed a fresh approach. I had been studying the 'Neuroscience of trust', understanding how emotional connections and cognitive biases influence purchasing decisions.

"It's about building an emotional connection through storytelling, understanding biases, addressing psychological barriers and emotional triggers when making decisions. Building trust quickly is achieved when a seller understands how to change a buyer's attitude, or mindset. This is achieved by a strategy that immediately impresses a buyer who otherwise would treat you with indifference."

Reps were trained in this new approach and not only got more appointments but soon needed more sales reps. The business grew turnover by over 20% for two years consecutively and continues to expand across the UK.



Canon

"Andrew helped our sales team with a totally fresh approach based on Canon's organisation philosophy of "Kyosei" (Living and working together for the common good).

He encouraged us to see that the only way to sell to our customers was to help them rebuild their business first and that's exactly what we did. We managed to achieve dominant market share across the whole of Europe with a renewed sense of purpose and not without a little help from the strategy devised by Kiss the Fish."

Geoff Hobbin

Commercial Director (Europe), Canon Pro Print

www.canon.co.uk



Crowdhelix

COLLABORATION INTELLIGENCE

"I retained Oliver Hall at KTF Consulting to review and rejuvenate our Sales effort. This included providing a comprehensive sales pipeline tracker, building a company-wide commercial incentive scheme and preparing myself as CEO for takeover of the CCOship, following the KTF Client-Coach Selling course. Oliver brought boundless energy, persistence and resilience to the table and helped Crowdhelix through a challenging period of key formative change."

Michael Browne

CEO, Crowdhelix

www.crowdhelix.com





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IT USED TO BE
ABOUT
BRUTE
FORCE!



THEN IT GREW
INTO A
CHARM
EXERCISE



THEN ALONG CAME
HUNTERS
Vs
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FRACTIONAL



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Q&A

Liberti Club talks to David Worthington, Regional Director, North of England at Kiss The Fish, about why demand is rising for fractional Sales Directors and where they have the biggest impact

LC: Why are you seeing more demand for fractional Sales Directors?

DW: Most businesses are sitting on more sales potential than they realise and the issue isn't talent, it's direction. Very often, teams have fallen out of sync with changing markets, and nobody has stepped back to realign the strategy. The founder is still leading sales, but is spread too thin. The Sales Manager is strong tactically, but needs strategic direction. There's no sales process, every rep is doing their own thing, so results are inconsistent.

A fractional sales director fills the leadership gap with decades of board-level experience, and implements scalable, repeatable sales systems tailored to market, team, and targets.

Our fractional sales directors have already driven real, measurable sales growth. They're strategists who can diagnose the real issues behind stalled revenue and hands-on leaders. In larger businesses, we often coach the existing Sales Director, accelerating their impact with senior-level strategic support. For the majority of our clients under £50m turnover, we dive into people, processes, pipeline, pricing and market positioning, then we build a proven plan for growth.

LC: What is the most common problem that a fractional sales directors fixes?

DW: Too many businesses treat pipeline problems like minor cuts and use a sticking plaster, whether it's a deal

slowing down, conversion dipping, or shaky forecasting. When something's off, it's rarely because a salesperson didn't chase hard enough, it's usually a deeper issue: misaligned messaging, weak qualification, cluttered handoffs, no clear next-step rhythm, and a funnel that leaks more than it leads. The teams that win step back, diagnose properly, and rebuild the flow so deals move with momentum, not luck.

Experienced fractional sales directors understand that strong pipelines aren't patched, they're engineered. Most SME pipelines aren't broken, they're just full of stuff that was never real in the first place. Pipeline management isn't just admin or CRM management, it's commercial leadership.

A disciplined pipeline is the cheapest growth strategy an SME has, because when you manage it properly, you get focus on the opportunities that actually convert, honest forecasting, shorter sales cycles because every deal has a next step, and a team that sells with confidence. The fix isn't complicated: define your stages clearly, qualify harder, earlier, run a weekly pipeline rhythm, and track a handful of meaningful metrics.

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People led growth: Transforming talent solutions

From designing a workforce strategy for growth to enhancing the capability of inhouse HR and Recruitment, fractional People Directors are enabling scale and creating value for investment and exit.

“Dy was extremely good at very quickly identifying and clearly defining the problems, and then bringing great clarity to the solutions she put forward.

You need your HR department to be stable and fully functioning before you can successfully roll out any kind of transformation plan. Without that solid foundation, change programmes fail because the people infrastructure isn't there to support them.”

Kate Ross

Chief Transformation Officer - Connected Places Catapult

85+

OF THE UK'S MOST
EXPERIENCED STRATEGIC
PEOPLE DIRECTORS

15

STRATEGIC PARTNERS
WITH COMPLEMENTARY
SERVICES

1000+

AMBITIOUS
SMES SUPPORTED



The new rules of hiring

Ally Maughan - Founder & CEO, People Puzzles
ally.maughan@peoplepuzzles.com



The traditional hiring formula tells us that bigger problems require bigger solutions. Need support with your people function? Hire an HR manager. Need strategic people support? Hire an HR director. But what if your business needs director-level thinking without director-level budgets?

When businesses hit 20-50 employees, they typically follow one of three paths:

- **Hire junior** – Bring in an HR coordinator or emerging manager who can handle the administrative tasks.
- **Hire senior** – Recruit an experienced HR director, paying a lot for expertise you might only need 20% of the time.
- **Struggle on** – With the MD or FD trying to handle all the HR stuff and core business, leading to compliance risks and missed growth opportunities.

None of these paths solve the real problem: how do you set up your business to achieve your goals faster and more profitably by getting the right people doing the right things, without committing to the full-time cost of an untested People Director? People Puzzles has spent over 15 years proving that the right expertise, applied strategically, can deliver 100% of the impact in 20% of the time.

One example was a 55-employee IT services company wasting money on recruitment agencies while their CEO considered selling up due to revenue pressures. Our People Director worked one day per week to: restructure the leadership team from 8 roles to 5 focused positions; implement HR systems and processes from scratch; bring recruitment in-house, cutting agency costs by 40%; and provide strategic coaching to leadership during the transformation.

The company moved from crisis mode to strategic growth, with proper foundations to scale. The CEO said: "Having someone who could think strategically about our people challenges completely changed our trajectory".

The magic isn't just in the time allocation, it's in the quality and focus of that time. Our People Directors are board-level professionals who can diagnose problems quickly and implement solutions that work – the 20% that drives 80% of results. They have a commercial mindset and understand that HR exists to enable business growth, not just manage compliance. They also develop future leaders with light-touch mentoring and developing, growing the internal capabilities of the business for the future.

Before your next senior People hire, ask if you need this expertise 5 days a week, or the right expertise when it counts. Would you rather have 100% of someone learning on the job, or 20% of someone who's solved this problem 100 times before? Is your challenge about workload management, or strategic thinking? Our network of 85+ specialists means the right expertise is always available for specific challenges and different stages of scale.

As more organisations look to reduce the risk and cost of permanent hires with flexible talent solutions, fractional People Directors can design and deliver an HR strategy to scale. In a world of specialist expertise, the old rules of hiring don't apply anymore.

Would you rather have 100% of someone learning on the job, or 20% of someone who's solved this problem 100 times before?



From discovery to distinction

easyfundraising, an online platform turning everyday shopping into free donations for good causes, approached People Puzzles to move its employee experience from good to great – who led an award-winning solution.

Based in Lichfield, Staffordshire, easyfundraising had a strong purpose and positive culture, but faced barriers around middle-management ownership, career pathways, communicating decisions and consistency around recognition consistency.

"We wanted to move from being a good place to work to being a great one," says CEO James Moir. "With around 80 team members, we wanted to amplify their strong sense of purpose and ensure their people practices reflected the same values of generosity, inclusion, and collaboration that define their mission. That meant taking a deliberate, data-driven approach to change."

Between 2023 and 2025, fractional People Director Ben Birchall led a people-centred transformation, working closely with the internal HR team through discovery, root cause workshops, collaborative working sessions, and Line Manager Mastermind sessions.



"We knew we had strong foundations," Ben explains. "The journey was about honest conversations, acting on feedback, and ensuring the culture reflects the heart of who we are."

Ben's initiatives resulted in employee scores jumping dramatically: up 22% for fair pay, up 20% for recognition, up 19% for management integrity and 90% said management delivers on promises. The transformation earned easyfundraising recognition as one of the UK's Great Places to Work in Tech 2025.

"Having Ben from People Puzzles working with our HR team has been game changing," said James Moir. "Our people feel heard and the changes prove we mean what we say about fairness, recognition, and community."

www.easyfundraising.org.uk

2

YEAR
TRANSFORMATION

90%

CONFIDENCE IN
MANAGEMENT

1

GREAT PLACE
TO WORK AWARD

CORINTHIAN 

Scaling the team whilst cutting agency fees



When expanding sports hospitality business Corinthian realised that their rapid growth had led to an outdated, expensive, and unscalable structure, with an oversized leadership team and heavy reliance on agency recruitment, they called in People Puzzles to help.

Corinthian was founded in 2010 by Mark Hoskins and Gavin O'Callaghan. Starting from their rugby backgrounds, they built their flagship Pegasus Lounge into a successful VIP sports and events hospitality business operating across Manchester, Glasgow, and London. Like many successful start-ups, Corinthian grew organically by hiring friends and family, promoting loyal team members, and creating roles as they needed them.

With around 40 employees across three locations, and ambitions to scale further, they had no inhouse HR expertise, a large leadership team that delaying decision-making, no clear management structure or development pathways, and outdated processes.

Corinthian engaged People Puzzles People Director Divya Kanani-Jones one day per week to transform the business infrastructure, which quickly became eight days per month due to the scale of work needed.

Over 18 months, Divya supported headcount growth from 40 to 60 employees, cut recruitment costs by 35% by bringing it inhouse, and streamlined leadership to 5 core roles - including a new MD and full-time

functional Directors. She also led the implementation of the Breathe HR system across all 3 locations whilst enhancing management and leadership skills with executive coaching. "Executive coaching is a great way to help leaders to really develop into their strengths," Divya explained. "Coaching Mark throughout the restructure into his new role as MD was incredibly rewarding and helped him define and live up to the kind of leader he wanted to be."

"We found Divya's perspective invaluable," said co-founder & MD Mark Hoskins. "Having that external viewpoint has really helped embed great leadership structure and practices. She has created a really strong HR capability to help the business be self-sustaining as we go forward. On a personal note, I have really valued the help and clarity that her executive coaching has provided."

"We are in a much stronger position to support future growth and our recruitment costs have been massively reduced. Divya's guidance has helped put us in a great place – we have definitely benefited from having her with us in the team."

www.corinthiansports.co.uk

50%

GROWTH IN
HEADCOUNT

35%

REDUCTION IN
RECRUITMENT
COSTS

5

CORE LEADERSHIP
ROLES

JAM PAN

Q&A

Liberti Club Director Alex Evans spoke to Tom Pape about how Jam Pan has built an agile, end-to-end growth model powered by specialist partnerships, flexible expertise, and fractional leadership.

In 2024, learning, talent and technology solutions business Jam Pan reached a key stage in its growth journey, recognising the need for a more strategic approach to people, marketing, and commercial scalability. Fractional HR specialist People Puzzles introduced the business to a fractional CMO from The Marketing Centre, and together they helped shape a leadership structure and multi-channel growth strategy that delivered a £2m+ sales pipeline, £1.3m in partner-generated opportunities, and an eNPS score of +55 for employee culture and wellbeing.



Alex: What sets Jam Pan apart from competitors in the L&D space?

Tom: Jam Pan is an agile, highly specialised end-to-end learning solutions business. We started more than 11 years ago by supporting medium and large organisations with freelance learning, development, and talent specialists when they lacked the in-house capability or capacity to deliver against their people agendas. Today, we have a network of approximately 850 freelance consultants at any one time.

Much like Liberti's fractional leadership model, our consultants integrate seamlessly into client organisations — whether that's a single specialist or an entire delivery team — becoming a genuine extension of the business. As we've evolved, we've expanded into broader learning solutions and technology services. We now work with over 100 partners to deliver managed learning services end-to-end, alongside supporting clients with learning technology implementations, optimisation, and systems integration. For example, one client had 13 separate learning platforms across their European operation, and we helped consolidate and optimise these into a single streamlined solution.

Alongside delivery, we also provide consultancy services — from helping L&D leaders build business cases for technology investment through to sourcing and implementing the right tools for their organisation. What really differentiates Jam Pan is our agility, the depth of expertise we can access through our freelance network, and the value we create by combining specialist capability with a highly flexible delivery model.

Alex: As more businesses use AI to increase speed and reduce cost of delivery, how are you pricing your services to stay competitive?

Tom: Over the last decade, many organisations in our sector have operated with premium pricing models aimed at large corporates with significant budgets. However, the current economic climate is driving a much stronger focus on value and measurable return on investment. Clients are rightly asking how providers can leverage AI to increase efficiency, improve speed of delivery, and reduce costs — but at the same time, they still need experienced, human-centred expertise to guide and govern that process effectively.



At Jam Pan, we've always been highly value-focused, so rather than simply reducing cost, we're focused on delivering more value for the same investment. That approach is resonating strongly with clients and has helped us secure several long-term managed service contracts.

Alex: Why have you opted to work with multiple fractional leaders in your business?

Tom: Yes, we've worked closely with several Liberty partners, including Robin Stirzaker-Philips from People Puzzles for HR, Beth Cooper from The Marketing Centre for brand and marketing, and more recently Richard McCandless from Kiss the Fish for sales. As an owner-managed business of around 20–30 people, we've always punched above our weight. However, as the business grew, we recognised the need for more senior specialist expertise in areas such as HR, marketing, and sales — without necessarily requiring full-time appointments in each discipline.

The fractional model was therefore a natural fit for us. It aligns closely with our own DNA as a flexible, expertise-led business model. We wanted experienced people who could come in, quickly understand the business, and make an immediate impact from day one.

Liberty introduced us to People Puzzles, and Robin has been exceptional. Beth has had a similarly positive impact. She genuinely feels like part of the Jam Pan team — most people wouldn't realise she's fractional.

Historically, Jam Pan grew rapidly through referrals, partnerships, and word of mouth, so marketing was never a major focus for us. Beth has helped us become far more strategic in our marketing and intentional in how we position the brand and go to market.

For example, we previously invested heavily in large-scale events such as Learning Technologies, whereas now we're taking a much smarter, more targeted multi-channel approach to marketing spend and campaign activity.

Alex: Is there anything you've gained from working with fractional leaders that you didn't expect?

Tom: What Beth and Robin have brought to the business goes far beyond their core functional expertise. They've become genuine members of the Jam Pan team and have added an invaluable external perspective to how we think about the business overall.

Because they work across multiple organisations and industries, they bring fresh ideas, broader commercial insight, and different ways of approaching challenges that we may not naturally see from within our own environment.

That external perspective has been hugely valuable. It's not just about HR, marketing, or sales support — it's about having experienced strategic partners who contribute to the wider evolution and growth of the business.

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We're seeing
engagement at
a level I've **never**
experienced before

Paul Faulkner, CEO at TES

“
Our revenue has
more than trebled
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MD at Planteria



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**Better people.
Better business.
Better life.™**



Q&A

How is the role & impact of fractional people directors evolving?

LC: At what stage of growth do fractional People Directors have the most impact?

SH: Most SME founders don't realise they need a fractional People Director until decisions become reactive instead of intentional; managers avoid difficult conversations; senior leaders are pulled into performance issues weekly; expansion plans start to feel risky from a culture perspective; the HR team is busy, but not strategic; and hiring, pay and progression feel inconsistent. A full-time HR Director feels too early and unnecessary, but doing nothing feels reckless. The founder is still the bottleneck, managers aren't

stepping up, culture feels stretched as headcount grows, performance is inconsistent, and growth is harder than it should be.

At People Puzzles, we don't start with HR. We start with where the business is trying to get to, what's holding back growth, and how people, leadership, and culture need to evolve to support it. Then we act as a Fractional People Director, embedded in the leadership team, focused on results, not just risk.

Sarah Hamilton

Regional Director, People Puzzles, East of England
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LC: How does your support of employers compare to a full time HR Director?

AH: As a fractional People Director, I'm brought in as a trusted advisor. I can share insight and expertise on what is working well in other firms of a similar size. Because I sit outside the organisation and work across multiple contexts, I can offer that valuable external perspective, but with the benefits and commitment of working long-term with my client, embedded in the leadership team. It's the best of both worlds.

I stay focused on what decisions mean for the business: growth priorities and the trade-offs. The same applies to partnerships. Fractional work is, at its core, about building clear, pragmatic partnerships that deliver value. The power of data done well is a key part of my role. The real value of HR Tech isn't the software, it's the insight it enables. Quality data and thoughtful analysis allow HR to move from administration to impact. The right tools accelerate that shift and allow us to focus on business intelligence, not mechanics. Having that longer-term relationship with clients means we can use that data to bring about really transformational improvement, and be a part of it as the business evolves.

Ana Hay

Fractional People Director, People Puzzles
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Q&A



Liz Jackson MBE, Director and Co-owner of Initium, talks to Liberti Club about how founders should prepare for the best exit and the role of fractional leaders in building value.

LC: What are the most common pitfalls you help sellers avoid?

LJ: One of the first things we say to founders is that selling a business is unlike anything they've done before. Most buyers have completed multiple acquisitions, but for many founders it's a once-in-a-lifetime experience. We help to bridge that gap. Good housekeeping and preparation are absolutely key, making sure you have all of the information you need in a format that's 'diligence proof'.

Some unadvised sellers give away too much too soon. We carefully control the flow of information so buyers receive the right information at the right time. Behind the scenes we're also helping clients navigate technical issues, from regulatory approvals to changes in accounting policies that can delay a transaction.

LC: How do you help founders build value for the best investment or exit?

LJ: Every founder wants to know the business they've worked so hard to build will be recognised for its true value. The challenge is that buyers often see things rather differently. A key part of our Value Assessment service is looking at a business through a buyer's eyes – evaluating the management team, succession planning, go-to-market strategy and opportunities to grow EBITDA.

We've seen enough transactions to know the red flags. The rewarding part is helping clients turn them green before buyers ever see the business. Then we create genuine competition between multiple buyers, creating choice and helping tell the story not just of where a business has been, but where it can go.

LC: How are fractional leaders helping your clients to build value?

LJ: Fractional leaders are becoming an important part of that journey. Through partners like Liberti, founders can access experienced CFOs, CMOs, CROs and CPOs who bring fresh thinking, strengthen leadership capability and help build resilience. It also prepares businesses for change. Buyers take confidence from organisations that are able to thrive beyond the founder and adapt as new leaders come in.

LC: Initium has a Fellows network of over 250 former clients. How does this enhance your service?

LJ: Our Fellows have been there and done it, and they bring something advisers can't always offer – first-hand experience of the emotional side of selling a business. They genuinely enjoy giving something back by sharing what they've learned with other entrepreneurs considering their own exit. Those conversations often become some of the most valuable people have during the whole journey.

LC: Initium is employee-owned. How does that differentiate you from other corporate finance advisory firms?

LJ: Becoming employee-owned reinforced something that has always mattered to us – putting people first. We're all co-owners, so we understand what founders have invested in building their businesses. We only act for sellers and don't rely on buyers or investors for our work, so we can give genuinely independent advice that's completely centred on our clients' best interests. Knowing your business is a different skill to selling it. We're privileged to help founders do both.

Liz Jackson MBE – Director, Initium
liz.jackson@initium.com
www.initium.com



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AMBER RIVER


Q&A



Amanda Browning, CEO of Amber River Shipman Wealth, explains what founders should prioritise to maximise wealth and how financial planning aligned with fractional C-suite solutions enable more profitable growth.

LC: What tax shifts should business owners be preparing for in 2026 and over the next three to five years?

AB: The Chancellor has already signalled further reform to business and personal taxation from 2026, including changes to Inheritance Tax thresholds and potential adjustments to Business Relief. While the final detail is still awaited, we expect tighter qualification rules for certain trading companies and clearer distinctions between investment activity and genuine trading. Early conversations can help owners align personal wealth, business value and estate planning so the eventual transition, whether by sale or succession, remains tax efficient.

While policy will continue to evolve, several themes are clear: Increasing tax pressure on wealth, including potential changes to capital gains tax, inheritance tax, and reliefs. Greater scrutiny on business structures, particularly around profit extraction and tax efficiency. Pension policy shifts, as governments look to balance long-term fiscal pressures. Intergenerational wealth planning becoming more important, with more focus on how wealth is transferred, not just created. A continued move toward transparency and compliance, reducing opportunities for aggressive tax planning. For founders, the key is not reacting to every change, but building flexible, resilient structures that can adapt over time.

LC: What areas of financial planning do you help founders prioritise, especially if they are preparing for exit?

AB: Preparing for exit is not a transaction, it is a multiyear strategy. We help founders understand their “number”, not just whether expected sale values support long term financial goals but delivers the life they want. Then its tax structuring early on as reliefs, share structures, and timing decisions can materially impact outcomes. Ensuring personal wealth is well diversified, tax efficient and structured to your needs, so the business sale proceeds will help you in your next stage of life and planning. We help with risk management, ensuring both

personal and business matters are protected against illness, death, or business disruption.

LC: Why is Amber River different to other financial planning firms, and how do you help founders make the most of your advice?

AB: Life Landscaping is our approach to financial planning that starts with the life you want to live. It helps clients see their “whole life on one page” and understand how today’s decisions impact tomorrow’s lifestyle and business ambitions. What sets us apart is the combination of Chartered financial expertise, behavioural insight, and a technology supported framework. Our planners build long standing relationships with clients and their families, often spanning decades and major life events. This depth of understanding allows us to guide founders with clarity and confidence through complex decisions, including exits, succession planning and stewardship of multi-generational wealth. To get the best outcomes, we encourage founders to engage early, be open and transparent, especially about personal goals and concerns.

LC: How are fractional C suite solutions supporting your client businesses?

AB: Our clients tend to be founder led businesses. Fractional leadership teams are powerful for midtier businesses that are scaling quickly but can’t justify fulltime executive roles. Fractional’s can accelerate strategy, professionalise the organisation and prepare it for investment or exit. The greatest impact comes when fractional leaders work in tandem with financial planners, ensuring that commercial decisions support business growth and also strengthen the founder’s personal financial position and longterm goals. The key is not just having advisors but having aligned advisors who collaborate effectively.

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ENABLISTS

Q&A



Leah Boxell, Founder of Enablists, explains why she decided to build a fractional change & project management consultancy and the power of partnership.

LC: Why did you decide to launch the Enablists?

LB: In a previous role as Chief of Staff for NHS Professionals, I led Silver Command during the Covid pandemic, mobilising over 100,000 health professionals. Seeing firsthand what's possible when you remove red tape and empower people to act, I knew I wanted to be an enabler helping other organisations achieve real change and make a tangible impact.

LC: Who are Enablists and what sets you apart from traditional consultancies and professional services firms?

LB: Enablists is a challenger to the typical consultancy model that can charge a small fortune to businesses and direct contractors. We provide the consultancy experience with focused delivery, at a similar rate to a direct contractor, but without you having to rely on one individual resource to make that happen. Where consultant and contractors prioritise the project plan, we focus on the outcome and understand that you often have to pivot to achieve the best outcome.

LC: What kind of services do you provide, and how do you apply your knowledge of large organisations to support scaling SMEs?

LB: A mix of services, project management, change and transformation, but also operational leadership and chief of staff functions. People come to us if they're in a state of chaos and not only want a plan to fix it, but sustainable change so they don't fall back into it. We help SMEs avoid over-complicating processes like large corporates, where I'm helping them to untie knots of bureaucracy.

SMEs are constantly looking at how can they do things quicker and easier without having to bring more people in, especially now with higher costs of employment. We help SMEs bring in technology to transform and make

processes ultra efficient and effective. We also test whether the proposition is still meeting customer needs.

LC: Why did you decide to offer your solutions fractionally and how many are in your team?

LB: I see people with project teams and PMO teams that are 5, 6, 7, 8 people strong, and they don't need more than two people with the right processes and the right systems in place. You don't need to be paying all of those salaries, you just need the people that know how to get it done, and how to get it done quickly and efficiently. We know what works, and what's not going to work, and we're able to mobilise that quickly. There's 16 of us on the team at the moment, and we've got some big growth plans.

LC: Why are partner ecosystems important for scaling SMEs, and how have you used networks to grow your business?

LB: They're so important because they offer access to many different skills. That's what differentiates us as a consultancy as well. You get a team invested in getting to the right outcomes for the business. I always work on referrals and I always ask people's opinions on who they've worked with as well. If I need something in my business, I'll ask for a recommendation.

LC: How do you help founders get most value from you as a partner?

LB: Spending that time understanding how they work, what they do as an organisation, what their values are and what drives them. Once you know that, you'll know who the right people are from the team. That's what makes it a real partnership.

Leah Boxell – Founder of Enablists
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JUNGLE IT

Q&A



With AI adoption amongst SMEs cautiously growing, Liberti Club spoke to Urfaan Azhar, Jungle IT's Head of Cloud & AI, about how to improve optimisation and what scaling businesses should prioritise with this transformational technology.

LC: What is the difference between Assistant and Agentic AI?

UA: An assistant is a very good graduate who never leaves their desk. Ask it a question, get an answer. It surfaces and organises information with tools like ChatGPT, Copilot and Gemini. It saves time per person and per task. It changes how the week feels, but it does not change the accounts.

An agent doesn't wait to be asked; it watches and acts. It does the work, like invoice matching, order entry or reconciliation, and escalates the exception. A supplier invoice lands, for example. It's read, matched against the PO and the goods-received note. If it reconciles, it's posted. If it doesn't, and only if it doesn't, it goes to a human with the discrepancy already highlighted. Assistants save minutes. Agents move numbers.

LC: What should SMEs prioritise with AI, and what can wait?

UA: Is the work frequent, repeatable, based on information you already have, and measurable? The SMEs that benefit most will not automate everything; they will know which work to remove, which decisions to protect and where human judgement creates the most value. The tool is the last decision, not the first.

LC: How is Jungle IT supporting SMEs in their optimisation of AI?

UA: Whether it's building an AI roadmap, identifying opportunities to automate repetitive tasks, or implementing tools like Microsoft Copilot, AI assistants and emerging agentic AI solutions, we help organisations adopt AI with confidence. Every solution is built on secure foundations, designed to improve productivity and aligned with compliance requirements.

The result is less time spent on manual processes, better-informed decisions, and more capacity to focus on growth. The real power of AI comes from combining technology with human judgement.

LC: Why did you decide to offer your IT solutions fractionally?

UA: We regularly meet organisations where daytoday IT demands pull senior people away from the roles they're actually meant to be performing. We also see businesses that know where they want the business to go, but without the technical clarity to diagnose issues or chart the right path, so progress becomes slow. Our Fractional IT Manager service is designed to remove that pressure. We act as an extension of our client's team, providing the guidance, oversight and hands-on support needed to keep their technology moving in the right direction – shaping the IT roadmap, managing vendors, strengthening governance and leadership without the cost of a full-time hire.

LC: Why are partner ecosystems important for scaling SMEs?

UA: The businesses that scale most successfully aren't the ones trying to do everything themselves, they're the ones building trusted ecosystems around them. We've used partnerships to extend our expertise, strengthen our service offering and create more value for our clients. The real advantage comes from building an ecosystem of trusted partners who complement each other's strengths. When specialist expertise is available through a trusted network, businesses can move faster, reduce risk and focus on what they do best.

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Liberti Club: Growing stronger together

As the world's biggest provider of fractional professionals, Liberti supports clients with on-demand solutions across finance, people, sales and marketing – often in combination and at different stages of scale. This is enhanced by a partner panel of trusted advisors and business service providers.

“Working with the Liberti ‘ecosystem’ of part time Directors as and when we’ve needed it in the early stages of developing the business has been invaluable in setting our foundations for the next phase of growth.”

Steve Harvey

CEO - Camena Bioscience

1,000

FRACTIONAL PROFESSIONALS
SUPPORTING 1,650+
BUSINESSES

70+

REGIONAL DIRECTORS
MATCHING
750+ PRINCIPALS

15000+

SMES HELPED TO SCALE
BY 5 LIBERTI BUSINESSES


LIBERTI CLUB

Building a growth ecosystem

Alex Evans - Liberti Club Director
alex.evans@thelibertigroup.com



Liberti is the world's largest provider of fractional solutions, with operations in EMEA, Asia Pacific, and the US. Across the group, over 1,000 fractional professionals are supporting over 1,650 businesses.

To mark 25 years since the model was pioneered by Colin Mills with the FD Centre, we have launched Liberti Club to help clients across the group to maximise impact and value from our solutions and supporting partners. Liberti Club is a curated year-round programme of regional events, regular business insights and on-demand support from our network of principals and partners to ensure clients get the right help and advice at the right time.

Liberti Club is also a campaign to educate the wider business community about the evolution of fractional as a service and the power of partner ecosystems in enabling SMEs to scale more quickly and profitably. This ambitious campaign is supported by partners having the greatest impact on clients and mid-tier businesses across a range of services, from funding, investment and accountancy to insurance and tech.

In its 2025 Annual Report, the Scale-Up Institute (SUI) highlighted access to strategic leadership as one of the biggest barriers to scale – with 60% of the 1,000+ CEOs surveyed looking for board advisors and fractional execs with Finance, HR, Sales & Marketing expertise.

The SUI has always championed the importance of networks and regional hubs in helping scale-ups learn best practice and access expert advice. A new report from the Enterprise Research Centre, called The State of Small Business Britain - Navigating Uncertainty, found that 'social capital', and the role played by local entrepreneurial ecosystems, is vital to SME growth.

Work by Regional Directors across Liberti to bring founders, fractional professionals and partner experts together is an important part of this ecosystem. Opportunities to test ideas with peers and get advice from specialist advisors help leaders to make more confident strategic decisions.

It also helps founders and CEOs to understand the capability and experience they need in their leadership teams. We're seeing more businesses building fractional boards with multiple sister businesses – and more fractional professionals in our network partnering to support clients.

As demand grows for fractional leadership teams to scale more affordably, Liberti Club will help clients to access the right support at the right time and understand how to get the most value from partners and suppliers.

Ultimately, Liberti Club is a growth ecosystem, matching the biggest team of fractional professionals and partners with those creating the most economic value to help SMEs capitalise on opportunities and avoid costly mistakes.



Partnership for growth

How are fractional leaders enabling business owners to capitalise on partner ecosystems to scale more profitably?

"As the cost and risk of full-time hires has increased, the smartest organisations have moved from who does work to how work gets done, blending full-time, freelance, fractional and agentic workers within the business and a network of partners and advisors to complement delivery," said Liberti Club Director Alex Evans, speaking at the first Liberti Club Forum in London on Tuesday 21st April. "The question is how to orchestrate ecosystems to make the most of it all."

A thread that ran through the session was the importance of an abundant mindset: sharing knowledge, time and connections to create opportunity and building relationships for the right support at the right time.

"Relationships are what enable founders to scale their businesses, and advisors like us to tell business owners what they need to hear; we call it 'carefrontation'", said John Morris, Head of Growth Practice Management at accounting, tax and business advisory firm Blick Rothenberg. "Vulnerability is a source of strength for business owners who can admit that they need experience and expertise they don't have, because it unlocks so much growth potential."

"Accurate forecasting, financial reporting and pipeline management are vital, but also building capability to scale. Fractional leadership, whether it's finance, sales or HR, embeds the systems and processes that drive growth and reduce cost to increase profitability."

Jonathan Dunn - CEO of Initium

Fractional leadership is increasingly seen as a smart way to add capability and capacity to your existing team. It's an approach taken by insurance advisory firm Partners&, which has optimised fractional solutions and networks to support periods of accelerated growth.

"Partnerships allow us to build an ecosystem that goes beyond insurance," explained Billy Manley, Managing Partner (Business Development – South) at Partners&. "It's a real endorsement of the trust we have in the Liberti Group that we also use them within our own business. Their fractional strategic and operational finance support has increased capacity around our CFO and helped us manage peaks throughout our own journey."

Foundations for growth

Bringing in the right strategic leadership or advisory partner at the right time can be transformational for growth and helps to avoid costly errors.

Jonathan Dunn, CEO of corporate finance advisory firm Initium has seen a range of avoidable mistakes made by founders he has helped to successfully exit over the last 35 years. "Accurate forecasting, financial reporting and pipeline management are vital, but also building capability to scale," he shared. "Fractional leadership, whether it's finance, sales or HR, embeds the systems and processes that drive growth and reduce cost to increase profitability."





The scope of executive roles across HR, Finance, Sales and Marketing have expanded, compelling businesses of all sizes to find new ways to increase capacity and capability.

"As commercial leaders, CFOs are pulled into all areas of the business, from sales, marketing and people to technology, to bring a strategic financial perspective," commented Jamie Mills, CEO UK&I of The CFO Centre. "Even the best execs, working five days a week, are struggling to do everything well, and no-one knows everything. That's why we have seen more demand for fractional twinning, or CFOs CFO."

"Like other businesses within Liberti, we're seeing more demand for fractional twinning, not just supporting in-house marketing leaders with fractional CMOs, but also working alongside finance, sales and tech leaders," said Lucy Hogarth, CEO of The Marketing Centre. "At the same time, clients increasingly need support to navigate the growing complexity of marketing, with more channels, more data and AI adding another layer. This is driving demand for broader fractional marketing capability to build the right structures, systems and plans to deliver sustainable growth."

With over 142,000 senior professionals describing themselves as fractional leaders in January 2025 and more coming into the market, how easy is it to find the right one?

"The growing challenge is finding the right solution as so many executives are going fractional, with lone rangers flooding the market," said Liberti's Group CEO Sara Daw. "We believe businesses should look for a fractional C-suite solution with a combination of technical, emotional and collective intelligence as part of a joined-up team and partner ecosystem. This is why we have seen more clients working with multiple principals within our group."

As orchestration becomes the biggest enabler of growth, what makes genuine partnership work? "Fractional leaders are self-managing, help to orchestrate a blended workforce, and ensure businesses gain most value from the right partners at the right time," concluded Sara Daw. "Ultimately, the future of leadership and growth is partnership, to be stronger together."

"Like other businesses within Liberti, we're seeing more demand for fractional twinning, not just supporting in-house marketing leaders with fractional CMOs, but also working alongside finance, sales and tech leaders."

Lucy Hogarth - CEO of The Marketing Centre



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Q&A

There are 766,847 family firms in the UK, contributing £1.6 trillion to the economy, and over 3 million jobs, according to research for Family Business UK compiled by The Scale-Up Institute. Only 58% have boards, with 70% looking to recruit more experienced leaders, and 60% looking to access a fractional executive.

Only 369 UK family firms have been trading for over a century, and one of them has maximised fractional because of their MD Andrea Millington. Founded in 1913, Preedy Glass is a proudly family-owned business specialising in everything from heritage restorations to contemporary projects, with a reputation for craftsmanship, quality and innovation. Liberti Club spoke to Andrea about how she became MD and how she has made the most of fractional experts and peer networks to lead and scale more successfully.



LC: You started your career as a financial controller. How did you become a Managing Director?

AM: I'm originally from Slovakia. After my first year at university, I came to the UK, fell in love with the country, and decided to stay. Once I'd learned English, I went into finance because it was familiar territory. The technical side came naturally, but I quickly realised I enjoyed solving business problems far more than accounting itself.

I joined Preedy Glass as Financial Controller 11 years ago. After sorting out the finance function I was promoted to Finance Director, then progressed to Operations Director when I got involved in other areas of the business like HR and H&S. I drove forward implementation of new software, servers and general changes in company structure and culture before officially becoming Managing Director in April this year.

LC: What has it been like leading in such an established family business?

AM: Preedy Glass has always been family-owned. I'm the first female director and the first non-family Managing Director. I have similar values to the family, which has helped a lot. One of my biggest priorities has been helping the family see the business as a business first and a family second. I've proved that I can not only make decisions, but drive change forward. My decision to work with fractional leaders, across Sales, Marketing and HR, has helped us to get further faster with the right experts.

LC: How did you first get involved with fractional specialists?

AM: Through the MD2MD network. I like being in rooms where I'm learning from people who know more than I do. That's where I met leaders from Kiss the Fish, People Puzzles and The Marketing Centre.

What appealed to me most about them was that it never felt like they were selling. If they could help Sales, Marketing or HR, they would; if they couldn't, they were honest about it. That built trust. They're genuine specialists. I don't need to be an expert in everything. You can bring in exactly the expertise you need, exactly when you need it. And if the business needs a different specialist in the future, nobody takes it personally, and they have a network of fractional experts you can tap into. It's flexible, practical and focused on what's right for the business.

LC: Why did you choose join the MD2MD network?

AM: The quality of the peer group. It's a trusted environment where Managing Directors can speak openly with other business leaders facing similar challenges. The face-to-face meetings and locations work particularly well for me.

I genuinely enjoy helping people, especially when it comes to leadership and sharing experiences of what went wrong so people can hopefully learn from that and do better. I love watching other people grow. I also make sure that I'm learning from leaders who have experienced more than I have and experts who can help me make better decisions. The right networks and partners can help to make you a better and more effective leader.



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Enabling M&A growth through partnership



Partners& is a Chartered insurance advisory business providing specialist insurance, employee benefits, risk management and claims advice to businesses and private clients. Founded in 2020, its aim is to challenge the status quo by move away from the transactional nature of the insurance industry and bringing people and relationships back into clear focus.

Partners& has worked with the CFO Centre on two distinct projects – M&A due diligence and a finance transformation project.

In 2024, the changes to the capital gains tax regime presented Partners& with a unique opportunity to complete a number of acquisitions in a short space of time. Whilst Partners& wasn't resourced for such unique peaks in activity, having access to the experience, capability and support that a fractional CFO can provide enabled them to successfully execute multiple acquisitions simultaneously.

Chris Thomas, who worked with Partners&, was able to quickly assimilate into the team, conduct the required due diligence exercises for the prospective acquisitions and report back to their internal CFO effectively. Based on the success of that project, CFO Simon Haynes did not hesitate to call on Chris again as it launched a finance transformation project.

Partners& CEO Phil Barton said: "Working with The CFO Centre we were able to leverage high quality capabilities and a different set of experiences and insight, which has enabled us to refine our diligence process and seize a major growth opportunity, and build reliance into our finance function."

"This collaborative approach with Partners& has expanded beyond the relationship with The CFO Centre and sister businesses within Liberty," said Matthew Mills, CRO UK&I, The CFO Centre.

"As our understanding of Partners& and its insurance solutions has grown, our Regional Directors and principals have recommended them to CFO Centre clients to improve their risk management, especially around cyber, employee benefits and business interruption."

As the partnership evolves, Partners& will continue to explore opportunities to collaborate with other Liberty Group businesses, including The Marketing Centre and Kiss The Fish.

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2

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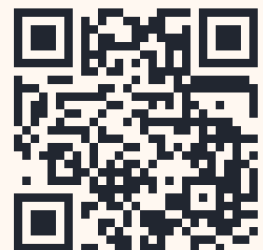
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GoGlobal Q&A

The biggest risk in international growth is assuming success in one market automatically translates to another. Liberti Club spoke to Jason Gerlis, Chief Revenue Officer at GoGlobal, about the importance of your operating model in creating value from international expansion.



LC: Why are you seeing more UK firms looking to expand internationally?

JG: Growth in your home market eventually becomes limiting. Investors expect continued expansion, customers are increasingly global and the fastest-growing companies know that new markets can unlock the next stage of growth. International expansion offers access to larger customer bases, new talent, strategic partners and greater resilience; but it also changes the complexity of running the business. The product may travel. Customer demand may travel. But the way you hire, employ, pay and manage people changes with local customs, regulations and legal requirements. That's where many businesses get caught out. The companies that create the most value internationally don't necessarily choose better markets, they build operating models that scale.

LC: What are the most costly and avoidable mistakes?

JG: The most expensive mistakes aren't commercial, they're operational. Leadership teams spend months deciding where to expand and only days thinking about how they'll actually operate once they're there. Employment, payroll, compliance and legal structures are often treated as administrative details. In reality, they determine how quickly you can hire, how much management time expansion consumes, how much risk you carry and ultimately whether international growth remains profitable.

We regularly see businesses with genuine customer demand struggle because nobody owns the operating model. HR owns recruitment. Finance owns payroll. Legal owns compliance. Local providers own different elements of final-mile delivery. Everyone owns a piece, but nobody owns the end-to-end.

LC: How does GoGlobal enable more profitable international growth?

JG: Profitable international growth comes from removing complexity, not adding it, and building an operating model that can scale efficiently as the business grows. That is where GoGlobal helps. We start by understanding

the client's commercial objectives, whether that's speed to market, access to talent, cost optimisation or long-term market presence.

Instead of asking leadership teams to coordinate multiple providers across different countries, we provide a single operating model with consistent governance, reporting and visibility, backed by experts who understand the local employment, payroll, compliance and regulatory requirements in each market. That reduces management overhead, lowers operational risk and helps businesses deploy capital more efficiently. Leadership teams spend less time solving operational problems and more time focused on customers, talent and growth.

The outcome isn't just compliance. It's faster execution, better decision making and a more scalable business. That is what ultimately makes international growth profitable. Every business wants to move quickly. The challenge is doing it without creating complexity that slows you down later.

LC: How important are partner ecosystems in supporting international growth?

JG: The best businesses know they don't have to be the best at everything. That's one of the biggest shifts we've seen over the last decade. Competitive advantage isn't about owning every capability. It's about knowing which capabilities create value inside your business and which are better delivered through trusted specialists.

International expansion touches finance, people, legal, tax, compliance and operations. No organisation should pretend to be world-class at all of those things.

That's why Liberti Club's ecosystem is so valuable. It brings together specialists who solve different parts of the same growth challenge. For our clients, that means better decisions, joined-up thinking and fewer gaps between strategy and execution.

Jason Gerlis – CRO, GoGlobal
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www.goglobal.com



Q&A



Sarah Clark, CEO of The Legal Director, explains why SMEs need proactive legal support and how fractional leadership is reshaping the way ambitious businesses access expert guidance.

LC: Why is it important for SMEs to have regular access to legal advice to support their growth?

SC: Most SMEs think about legal support reactively, when something goes wrong, when a contract needs signing, or when a dispute arises. But the businesses that grow most confidently are the ones that have legal counsel embedded in their thinking from the outset. A good GC doesn't just manage risk; they help founders make better decisions, move faster and avoid the kind of problems that become expensive to fix later. Regular access changes the dynamic entirely. It means your lawyer understands your business, knows your ambitions and risk appetite and can give you commercially grounded advice rather than cautious, generic guidance.

LC: How does The Legal Director differ from a traditional law firm?

SC: The model is fundamentally different. We place experienced, senior General Counsels (GCs) directly inside businesses on a fractional basis. They become part of the leadership team. They're present in board meetings, involved in strategic decisions, building relationships with the founders and the wider team. That's very different from instructing a law firm, where you're buying time from someone who doesn't know your business and has no stake in your outcome. Our lawyers have all held senior in-house roles, so they bring genuine commercial judgement alongside their legal expertise. They're not advisors at arm's length; they're trusted members of the team.

LC: What are your most in-demand services, have these changed in recent years, and why?

SC: Commercial contracts and employment law have always been core, but we're seeing significant growth in demand around M&A readiness, risk register creation and AI governance. Businesses are scaling faster and at earlier stages, which means the legal complexity arrives sooner. We're also seeing more founders who've had a bad experience with traditional legal support, who want something more integrated and responsive. The shift towards fractional leadership across finance, HR and marketing has created a real appetite for the same model in legal and we've been doing this since 2007, so we're well placed to meet that demand.

LC: Why are partner ecosystems important enablers for SME growth?

SC: No single fractional leader can solve every problem a growing business faces. The real value comes when the people around the leadership table are connected, when your GC, your CFO and your People Director are working from the same understanding of where the business is going and what it needs. Partner ecosystems accelerate that. When we refer a client to the CFO Centre or People Puzzles, we're not just making an introduction. We're extending the support network around that client in a way that makes everyone more effective. Fractional leaders who collaborate closely deliver far more than the sum of their parts.

LC: How are you optimising partnerships to deliver more value to clients and grow your own business?

SC: We've invested significantly in building deep, reciprocal relationships with a small number of trusted partners rather than spreading ourselves thinly. The partnerships that work best are the ones where both sides genuinely understand each other's model and client base, where referrals are made thoughtfully and followed up properly. We track referrals in both directions, and we work hard to make sure our lawyers are visible and engaged with our partner communities, not just centrally connected at the top. That's what turns a partnership agreement into something that actually generates value for us and our clients.

LC: Why are fractional leadership solutions an important part of your partner ecosystem?

SC: Because our clients are almost always in the same position. They're ambitious, growing fast, and not yet at the point where full-time C-suite hires across every function make sense. When a client's CFO is fractional and their People Director is fractional, having a fractional GC alongside them creates a genuinely joined-up leadership team. We see the impact of this directly. Businesses that work with multiple fractional leaders from within a connected ecosystem make better decisions faster, because everyone is working from the same picture. That's the real power of the model.

LC: What is your advice to founders on how to maximise value from peer networks and partner events?

SC: Show up consistently and come with something to give, not just something to get. The founders who build the most valuable networks are the ones who are generous with their insight and their time, who make introductions, share what they've learned and engage genuinely with the people in the room. The transactional approach rarely works. A peer network is a long-term asset, and it compounds over time. The same is true of partner relationships — the more embedded and visible you are, the more naturally opportunities flow. Don't wait until you need something to start investing in those relationships.

“The real value comes when the people around the leadership table are connected, when your GC, your CFO and your People Director are working from the same understanding of where the business is going and what it needs. Partner ecosystems accelerate that.”

Sarah Clark – CEO, The Legal Director
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Regret Prevention

There are many potential pitfalls and avoidable mistakes when securing investment or preparing for exit, so how can founders avoid the erosion of value and wealth and maximise the right experts at the right time for the best outcome?

On Thursday 4th June 2026, Liberti Club hosted a Forum at The Delta Marriott in Bristol to help scaling business owners in the South West to answer these and related questions, from how to avoid the most costly mistakes to the big decisions that have to be made, and how to make them.



Liberti Club Director Alex Evans set the scene by sharing some stats on growth drivers and M&A trends for UK businesses. "Nearly 45,000 scale up firms contributed £2.19 trillion to the UK economy in 2025, half of total economic output, but access to strategic leadership, talent and finance are the biggest barriers to growth according to the Scale Up Institute," he explained.

"With the cost of a bad exec hire estimated at four times salary, and 60% of scale up founders looking for board advisors, demand for fractional has exploded over the last year, with 142,000 professional execs describing themselves as fractional on LinkedIn in January last year compared to just over 2,000 in 2022. Preparation for investment and exit is driving demand for fractional leaders across finance, marketing, sales, HR and technology to build the strongest foundations for scale, create value and optimise the right advisors and suppliers."

In 2025, a total of £24bn was raised in 5,887 equity deals, according to Beahurst research, and first-time deals grew by 23.6%, with growing interest from foreign acquirers in 'under-valued' UK firms. McKinsey reports that the UK's average EV/EBITDA multiple is 7.7, compared to 13.8 in the US.

"Fractional leaders can form a key part of the management team that an investor is backing, enabling and accurately reporting on quality of earnings, predictable revenue, market opportunity and effective management of risk."

James Skade Investor, BGF

Offering advice on how to maximise valuation, BGF investor James Skade, explained that founders need to demonstrate a strong and capable leadership team, a clear understanding of how they would deploy funding, an ambitious but realistic growth plan backed by evidence, and have the financial and operational data needed to be 'partnership ready'.

"Fractional leaders can form a key part of the management team that an investor is backing, enabling and accurately reporting on quality of earnings, predictable revenue, market opportunity and effective management of risk," he added.

Simon Glover, Associate Director of sell-side corporate finance specialist Initium observed that two thirds of its deals feature an international acquirer. "The top two foreign buyers from our last 30 deals in terms of country of origin have been from the US and Sweden, with the highest sector demand in Technology, Business Services, Financial Services and TICC (Testing, Inspection, Certification & Compliance)," he explained.

"The biggest risks to successfully completing deals are poor-quality management information, too few people involved in the Due Diligence exercise, and the deal losing momentum," he added. "This can be mitigated by early preparation on financial reporting, accessing the right leadership capability and building an experienced advisory team to drive the process."



Tom McLintock, Senior Financial Planner at Amber River Shipman Wealth, rounded off the first session with some advice for maximising wealth from exit. “Be clear on your reason for exiting, the life you want afterwards and the real number you need achieve it so you know the minimum offer you could accept. Unrealistic expectations have cost founders dearly as changing macro factors have reduced valuations and they realise they should have accepted earlier offers.”

Fractional gains

The second session, a panel on creating value and scaling more profitably with partners, opened with an observation on how a fractional CFO has supported scale from Steve Gee, founder & CEO of Blend, a global membership community of cross-functional execs.

“I’ve spent years helping executives from the largest businesses to learn from their biggest mistakes and successes and the lesson I’ve taken is to play to my strengths as a leader and find the right experts for everything else,” he shared. “What Jess offers as a fractional CFO is not just expertise and experience as part of our team, but an independent perspective for more objective advice.”

“When my co-founder and I launched the business, we had a very clear vision for our values but also the value we wanted to build. Jess keeps us focused on that strategic goal but is now a real part of our culture.” Jess Masters, a portfolio finance leader with The CFO Centre, has worked with a range of businesses, including British unicorn Gymshark. Explaining how she supports

scaling businesses like Blend, she said: “My role as a fractional CFO is to help with clarity of vision and both the financial and commercial metrics for the growth plan to achieve it. When building the case for investment, accurate reporting and a clear plan for how funding will be deployed is vital, whether it’s spent on people, technology, or other fractional leaders who can support growth.”

Getting your financial house in order early is the best preparation for investment or exit, not just for accurate reporting but a better understanding of what’s driving profitability. “Most founders scale by selling successfully and maintaining growth momentum, but they lose visibility of who their most valuable clients are and those that actually cost them money,” observed Jennifer Raines, founder of YRH Finance Team. “Our team of financial controllers give scaling firms that visibility and accuracy of data to understand where they should be investing for more profitable growth, and building a financial back office that supports, rather than hinders, scaling.”

The panel observed that all founders begin as ‘chief everything officers’ and become ‘enthusiastic amateurs’, particularly in areas like sales and marketing, but this only gets them so far. “The role of fractional CMOs in value creation is to apply market and customer understanding to create a clearly defined and defensible value proposition, plus demonstrate ROI by ensuring that marketing is aligned with business objectives,” said Fiona West, a portfolio CMO for The Marketing Centre. “We also bring an objective view to branding, and how it can be decoupled from founder reliance to enhance equity value.”

The Legal Director

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Andrew Milbourn, CEO of Kiss The Fish, has seen growing interest from investors in fractional sales leadership to support scale before and after investment – a trend highlighted by BGF Investor Mark Nunny in our Future of Leadership & Growth report. “Growing a sustainable sales team is a challenge for most businesses,” said Nunny. “We therefore see a lot of investment in fractional sales leadership, especially in B2B firms.”

Concluding the panel, Alex posed a final question on how fractional leaders help founders to reassure investors and acquirers about future growth. “A capable leadership team gives confidence, not just to investors, but to the team who will sustain scale,” said Heather Melville, portfolio People Director at People Puzzles. “When founders exit the business, continuity of leadership and seamless succession is important.

Fractional leaders support that transition, not just operationally and strategically, but culturally as they are both part of the team and an independent advisor.”

Closing the Forum, Liberti Club Director Alex Evans highlighted the importance of partner ecosystems for growth. “The best preparation for investment, or exit, is to plan early, understand the numbers that matter, and access the right experts at the right time to future-proof decisions.”

“What Jess offers as a fractional CFO is not just expertise and experience as part of our team, but an independent perspective for more objective advice.”

Steve Gee CEO, Blend

Events Programme 2026



Our year-round programme of regional events brings together business leaders, fractional professionals and partners in Liberti's client community to share insight, advice and connections.



The new partnership model for growth

How can busy mid-tier business leaders capitalise on fractional solutions and partner ecosystems to scale?

Date: 21st April 2026

Time: 09:00 - 14:00

Location: London



How to prepare for the best investment or exit

How can ambitious SMEs optimise investment to scale and what will enhance valuation for the best exit?

Date: 4th June 2026

Time: 09:00 - 14:00

Location: Bristol



Transforming with AI to grow more profitably

How can business leaders capitalise on AI without exposing themselves to new cyber risks?

Date: 15th July 2026

Time: 09:00 - 14:00

Location: Leeds



Partnership to scale more profitably

How can SMEs capitalise on new growth models and partners to scale?

Date: 22nd September 2026

Time: 09:00 - 14:00

Location: Guildford



Dinner at Downing: New growth enablers for scaling science & the firms

Which solutions and partners are enabling today's start-ups and scale-ups to become tomorrow's unicorns?

Date: 23rd September 2026

Time: 18:00 - 21:30

Location: Cambridge



Breakfast Briefing with Partners&: Maximising performance & minimising risk

How can business owners prepare for the next macro challenge and build resilient, high-performing organisations?

Date: 7th October 2026

Time: 08:00 - 11.30

Location: Bath



Breakfast Briefing with Amber River Shipman Wealth: How to prepare for the best exit

What's the real number that founders should be aiming for to achieve their life ambitions?

Date: 13th October 2026

Time: 08:00 - 11.30

Location: Manchester



Breakfast Briefing with Initium: What really makes a business valuable?

What can leaders do to maximise value and minimise equity erosion for investment or exit?

Date: 15th October 2026

Time: 08:00 – 11.30

Location: Birmingham



How to prepare for the best investment or exit

How can ambitious SMEs maximise value, minimise due diligence risk and make the most of growth capital to scale?

Date: 21st October 2026

Time: 09:00 – 14:00

Location: Glasgow



Festival of Entrepreneurs

Join thousands of founders, investors and over 200 expert speakers including leaders from Liberti's group of fractional leadership specialists.

Date: 3rd & 4th November 2026

Time: 09:00 – 17:00

Location: Birmingham



Breakfast Briefing with Blick Rothenberg: Maximising profitability for growth & wealth

How can ambitious SMEs access value beyond capital for growth?

Date: 5th November 2026

Time: 08:00 – 11.30

Location: London



Leader Briefing with Amber River Shipman Wealth: How to prepare for the best life after exit

What's the real number that founders should be aiming for to achieve their life ambitions?

Date: 11th November 2026

Time: 14:00 – 17.30

Location: Bath



Breakfast Briefing with Initium: What really makes a business valuable?

What can leaders do to maximise value and minimise equity erosion for investment or exit?

Date: 12th November 2026

Time: 08:00 – 11.30

Location: Reading



Maximising talent & technology to scale

How are new workforce & leadership models, technology solutions and partners enabling SMEs to grow more profitably, in the UK and globally?

Date: 19th November 2026

Time: 09:00 – 14:00

Location: Birmingham



How to lead growth successfully in 2027

How can SMEs build the strongest foundations for resilience and profitable growth?

Date: 1st December 2026

Time: 09:00 – 14:00

Location: London

Visit <https://thelibertigroup.com/liberti-club-events/> to register your interest in attending.

Liberti Club Ecosystem

Liberti Club's campaign to help ambitious SMEs maximise fractional solutions and business services is supported by Liberti Group's market-leading fractional specialists and a panel of trusted Programme Partners.

"We believe businesses should look for a fractional C-suite solution with a combination of technical, emotional and collective intelligence as part of a joined-up team and partner ecosystem. We look for principals and partners with an abundant mindset, who are prepared to share knowledge, time, connections and even clients because this creates value."

Sara Daw

Group CEO - Liberti Group

30K+

TOTAL MID-TIER CLIENTS
SUPPORTED BY
LIBERTI & PARTNERS

80%

BUSINESSES WILL PRIORITIZE
REFERRAL MARKETING FOR
GROWTH BY
2027 (GARTNER)

84%

SALES BEGIN WITH A REFERRAL
IN B2B SECTORS
(FORRESTER)

Liberti Group comprises five sister businesses with a combined UK network of over 600 principals across Finance, HR, Sales and Marketing who have been matched to over 1500 clients by 60+ Regional Directors.



Since 2001, The CFO Centre has grown into the world's leading provider of part-time CFO services. We're here to give ambitious businesses access to experienced, high-calibre CFOs who bring clarity, confidence, and results that truly matter. Our work is grounded in real outcomes including stronger cash flow, increased profit, smarter scaling, and successful exits.

Find out more at
www.cfocentre.com/gb



We are a dedicated team of over 80 of the UK's most experienced HR Directors, working with businesses across the UK to help them thrive. Since People Puzzles was founded in 2010, we are proud to have helped over 1000 businesses on a flexible, part-time basis, using a strategic, people-focused approach to help our clients develop and grow.

Find out more at
www.peoplepuzzles.co.uk



Since 2011, we've helped 1400 small and mid-market business leaders make sense of marketing, to make more informed decisions and make the most of their investment. Our team of 100 fractional Marketing Directors / CMOs provide access to top-tier expertise without the commitment of long-term contracts to clients across the UK.

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www.themarketingcentre.com



Founded in 2007, Kiss The Fish has a network of highly motivated, seasoned consultants, each with proven board-level experience and a formidable track record in building and delivering significant sales outcomes across diverse global markets. Alongside strategic leadership, we also deliver structured sales training and coaching programmes, primarily for businesses with £1M to £10M in annual revenue.

www.kissthefish.net



Since 2007, YRH Finance Team has partnered with over 1,300 growing businesses to enhance their financial capabilities. Our specialist team of 100+ Part-Time Financial Controllers & Part-Time Finance Managers provide scalable financial operations that unlock 12-18% profit improvement. We typically work with businesses with £2M to £10M+ turnover.

Find out more at
www.yrhfinanceteam.co.uk

This select group of Programme Partners support Liberti Club's campaign of thought leadership and year-round regional events as champions of the most in-demand business advisory services.

AMBER RIVER

Amber River Shipman Wealth provides bespoke financial planning services and has supported over 38,000 clients with over 190 independent financial advisors in over 30 locations nationwide. We think about financial planning in a way that goes beyond financial advice. We call it Life Landscaping® and we're a group of like-minded, values-driven people with a passion for independent financial planning.

Find out more at www.amberriver.com

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Blick Rothenberg is a tax, accounting and business advisory firm that puts our people and client relationships first. Our partner-led approach ensures that you receive high quality service from a team of experienced, commercial and practically focused people. Combining technical expertise with personal integrity, we offer accounting and business advisory services, as well as advice on corporate and personal tax matters.

Find out more at <https://www.blickrothenberg.com/insights/topics/entrepreneurs/>

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GoGlobal - the global expansion business - is a leading professional services company, powered by tech, that helps businesses set up and manage global operations compliantly and confidently. By combining global expertise with local execution, GoGlobal supports market entry, M&A activity and vendor consolidation through a single point of accountability.

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Initium is an employee-owned corporate finance advisory firm that helps ambitious privately owned business owners sell their companies, maximise value pre-exit, and thrive post-sale. An independent advisor, Initium works exclusively for sellers across all industries and sectors. First established in 1989, and employee owned since 2022, Initium was recognised as one of The Sunday Times Best Places to Work in both 2024 and 2025.

Find out more at
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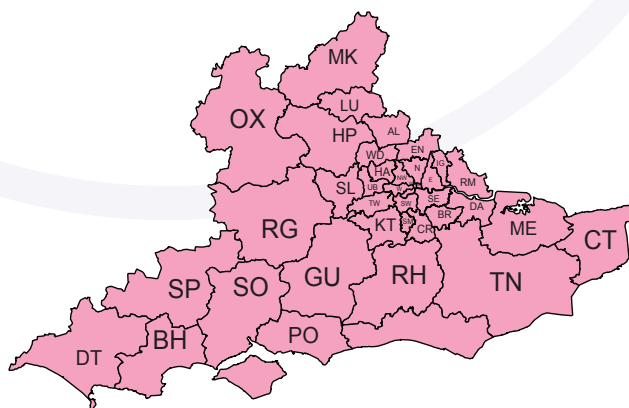
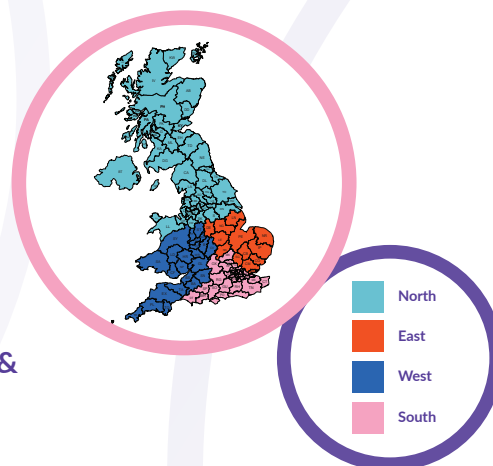
The Legal Director provides fractional General Counsel services to ambitious SMEs and in-house legal teams. Founded in 2007, we have built a community of experienced lawyers who combine deep legal expertise with genuine business acumen, delivering practical, high-quality support that makes a real difference at critical moments. We believe great legal leadership should be accessible to every ambitious business, whatever its size.

Find out more at www.thelegaldirector.co.uk

Discover more about our growing Liberti Club Partner Ecosystem and find one of our trusted experts at <https://thelibertigroup.com/liberti-club/partner-panel/>

Regional Director Map

To find the right fractional professional in your region, or find out how to join Liberty's national network of principals across Finance, People, Sales & Marketing, contact a Regional Director in your area.



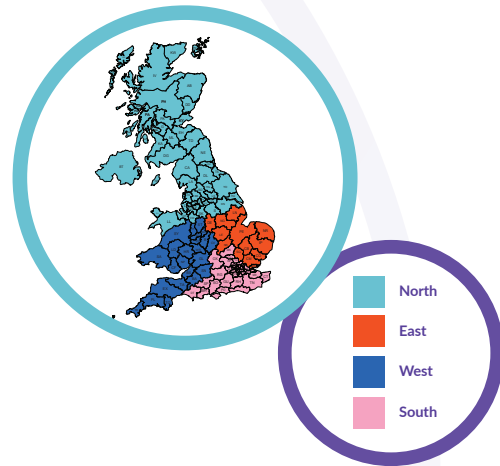
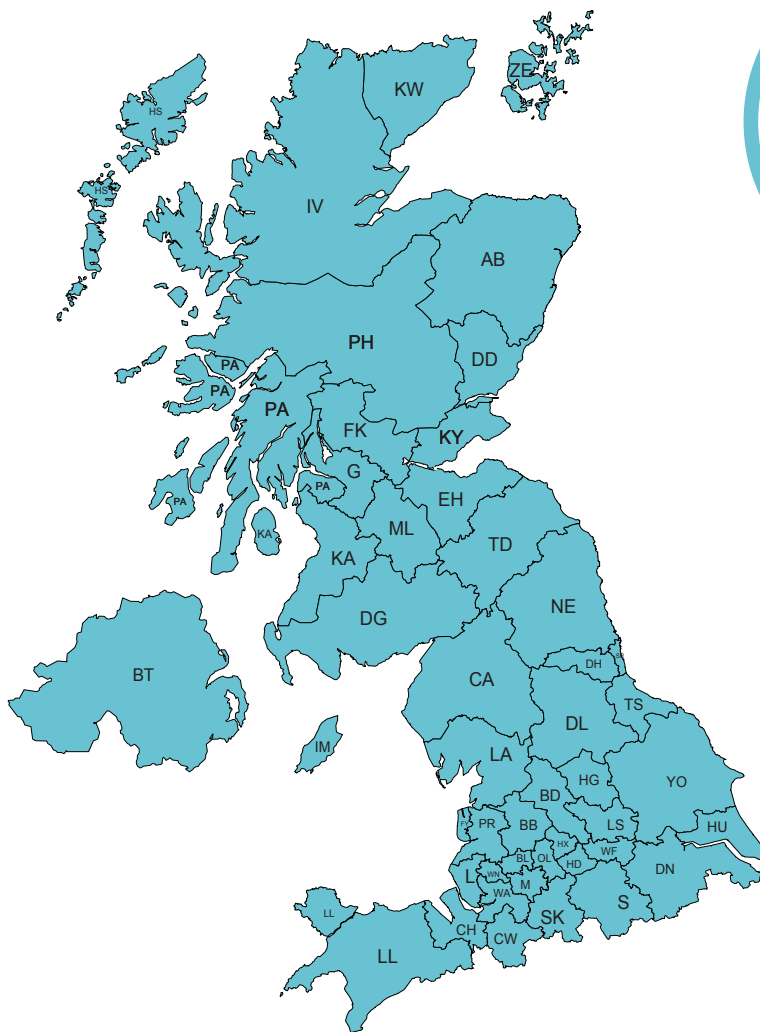
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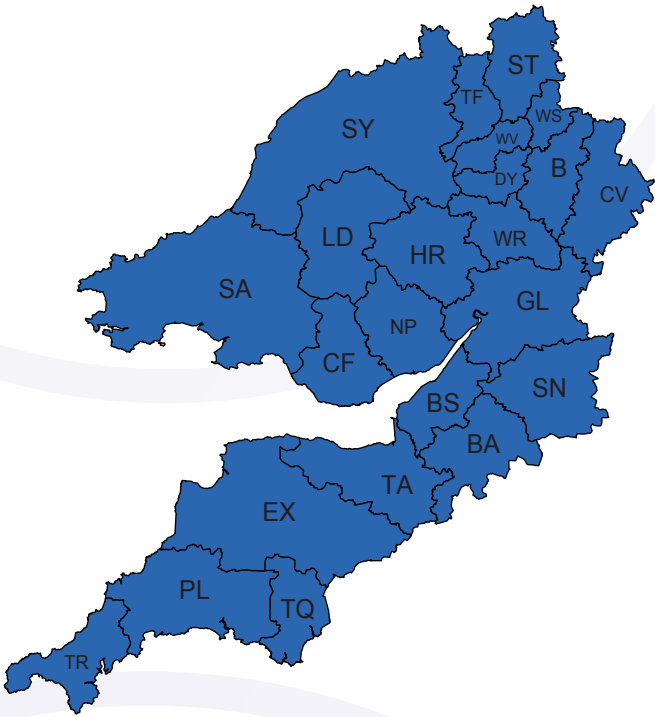
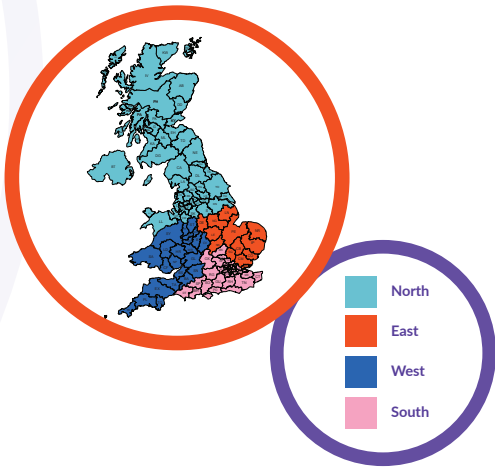


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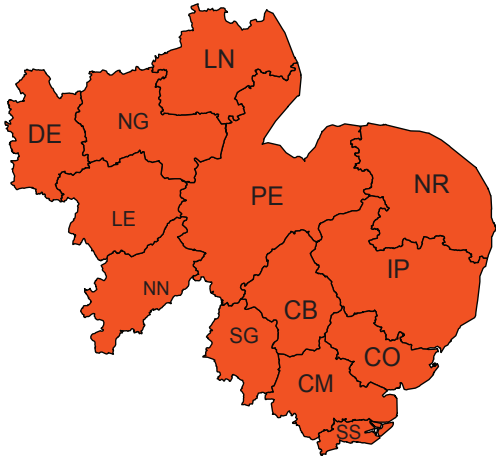
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East & West Regions overleaf...



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sarah.hamilton@peoplepuzzles.co.uk	People

Welcome to Liberti Club

Clients of any Liberti Group business now benefit from membership of Liberti Club and access to our peer, principal and partner community



Created to help ambitious businesses maximise impact and value from our fractional solutions, Liberti Club is a growth ecosystem providing a year-round programme of support.

Alongside access to our joined-up network of over 600 fractional finance, marketing, people and sales leaders in the UK, you also benefit from our ecosystem of carefully selected business service partners. So whatever challenge you're facing, the right help is always close at hand.

As a member of Liberti Club, you benefit from:

- ✓ Priority access to our year-round, regional events to connect with peers, potential clients & suppliers
- ✓ Monthly Leader Briefings with community insights & business intelligence
- ✓ An Executive Review with a fractional leader from one of Liberti Group's sister businesses

To find out more about how Liberti Club can support your growth, visit thelibertigroup.com/about-liberti-club/ to register for updates or contact Liberti Club Director Alex Evans at alex.evans@liberticlub.com.



Pioneering fractional C-suite leadership for 25 years

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