Illustrative example. This sample shows the format and depth of a US Buyer Proof report. "Closewise" is a fictional company. The interviews, quotes and numbers below are invented to show the format. They are not real findings.

US BUYER PROOF · BUYER SUMMARY

How US finance leaders evaluate an AI month-end close tool

Client: Closewise (fictional) · Buyer: CFOs and controllers at $20–200M US companies · 12 interviews · 2-week sprint

Bottom line

1. **The pain is real and specific.** 10 of 12 described the close as "the worst week of the month," mostly because of manual reconciliations and chasing other departments for information.
2. **Controllers want it; CFOs sign.** The controller is the champion. Anything over about $25K a year needs the CFO, and above $50K usually the CEO.
3. **Working with their accounting system is required, not a feature.** No one would switch accounting systems. "Works inside NetSuite / Sage Intacct / QuickBooks" has to be the first line of the pitch.

Stop believing: that "AI" sells itself. Several buyers reacted with caution ("Who's accountable when the AI is wrong at audit time?"). Lead with accuracy and audit trail, not AI.

Who we spoke with

#	TITLE	COMPANY REVENUE	INDUSTRY	ACCOUNTING SYSTEM
1	CFO	$85M	Distribution	NetSuite
2	Controller	$40M	Healthcare services	Sage Intacct
3	VP Finance	$150M	SaaS	NetSuite
4	Controller	$25M	Construction	QuickBooks
5	CFO	$60M	Manufacturing	Microsoft Dynamics
6	Assistant Controller	$190M	Retail	NetSuite
7–12	Six more CFOs and controllers at $20–120M companies in logistics, professional services, real estate and consumer goods			

Illustrative example. The quotes are invented to show the format; a real report uses only verified quotes from the recordings.

Pains, ranked by how often and how strongly they came up

PAIN	HOW MANY	IN THEIR WORDS
Manual reconciliations across bank, credit card and inventory accounts	10 of 12	*"Two people spend three days ticking and tying in Excel. It's not hard, it's just endless."*
Chasing other teams for accruals and approvals	8 of 12	*"Half my close is Slack messages asking ops if the invoice is real."*
Audit preparation and documentation	7 of 12	*"The auditors don't care that we closed fast. They care that we can show our work."*
Staff turnover erasing knowledge	5 of 12	*"When my senior accountant left, the close went from six days to ten."*

What they use today

- **7 of 12:** Excel checklists plus their accounting system
- **3 of 12:** a close-management tool, reported at **$15–40K a year**
- **2 of 12:** an outsourced bookkeeping or accounting firm for parts of the close
- What they dislike most about current tools: setup time and "another login nobody uses"

How they buy

- **Who decides:** the controller finds it, the CFO signs, IT reviews security
- **Where they hear about tools:** peers, their outside accounting firm, accounting-system marketplaces
- **Deal-breakers:** no SOC 2 security certification, no audit trail, setup longer than one close cycle
- **Foreign or early vendors:** acceptable with SOC 2, US support hours and 2 US customer references

Closewise's hypotheses, tested

HYPOTHESIS	VERDICT	EVIDENCE
Controllers spend 5+ days on the close and hate it	Supported	Median reported close was 7 days; 10 of 12 called it their worst week
The CFO is the main buyer	Mixed	The CFO signs, but the controller decides whether a tool ever reaches the CFO
Buyers will move work onto a new platform	Not supported	All 12 said it must work inside their existing accounting system
Being an Israeli company is a barrier	Mixed	Not a barrier on its own; missing US references and support hours are

Illustrative example. The target list below describes fictional companies to show the format. A real list names actual companies.

CUSTOMER AND MESSAGING MEMO

Who to sell to first, and what to say

Best-fit customer

- US companies with **$30–150M revenue** and a finance team of 3–10
- On **NetSuite or Sage Intacct** (11 of 12 said they'd consider it there)
- **Triggers:** a new controller, a first audit, a recent acquisition, losing a senior accountant
- **Avoid for now:** companies under $20M on QuickBooks (they're price-sensitive and their outside accountant decides)

Messaging that landed

- Lead with **"close in 4 days, with an audit trail your auditors accept"**, not "AI"
- Use their words: *"ticking and tying," "show our work," "the worst week of the month"*
- **Sample opening line:** *"How many days did last month's close take, and how many of those were reconciliations?"*

Top objections, and answers drawn from the interviews

OBJECTION	ANSWER
"Who's accountable when the AI is wrong?"	Every suggested match needs a human to approve it, and every step is logged for the auditors
"We can't do a long setup."	Promise a working setup within one close cycle, connected to their accounting system
"You're not a US company."	Show SOC 2, US-hours support and two US references

Target accounts (5 of 25 shown)

COMPANY (FICTIONAL)	REVENUE	INDUSTRY	STATE	WHY IT FITS	CONTACT TITLE
Example Co. A	~$90M	Distribution	OH	NetSuite; recently acquired a competitor	Controller
Example Co. B	~$45M	Healthcare services	NC	Sage Intacct; preparing for its first audit	CFO
Example Co. C	~$70M	Construction	TX	Hiring a controller (recent job post)	VP Finance
Example Co. D	~$120M	Logistics	NJ	NetSuite; finance team of 6	Controller
Example Co. E	~$55M	Consumer goods	GA	Multiple entities, slow close	CFO