

Case Study:

Business Reporting & Customer Analyses



Cloud-Based Inventory Management and ERP Software Company Selects  RTD INSIGHTS  for Business Reporting and Customer Analyses

Company and Situation Overview

- Headquartered in Midwestern U.S.
- \$12M+ in annual revenue; boot-strapped, founder-owned company
- Newly-hired CEO seeking set-up of finance and accounting function

Challenges without RTD Insights

- X No CFO; VP of HR managing finance and accounting with limited support (only one other dedicated individual for AR and AP management)
- X Cash-basis accounting lacking GAAP compliance; limited documentation of internal policies and processes
- X No KPIs or visibility into performance of business and unit economics

Results with RTD Insights

- ✓ Worked closely with VP of HR and CEO to document and implement numerous finance and accounting workflows and processes
- ✓ Created numerous analyses across all customers and product types to determine restated financial performance in accordance with GAAP
- ✓ Assessed cohorts and pricing details across all customer segments