

Case Study:

Reporting,



Forecasting & Budgeting

Tech-Enabled Value-Based Healthcare Company Selects

RTD INSIGHTS  for Financial Reporting, Forecasting & Budgeting

Company and Situation Overview

- Headquartered in Eastern U.S.
- \$10M+ in annual revenue with numerous independent reporting units
- Lean finance and accounting team; Controller with limited capacity

Challenges without RTD Insights

- X Existing financial reporting package required significant manual, repeatable workflows resulting in loss of productivity for Controller
- X Complex reporting by units, requiring time-consuming consolidation and roll-up of financials
- X Limited KPIs; no internal rolling forecast to optimize performance

Results with RTD Insights

- ✓ Worked closely with Controller to create enhanced, simplified version of reporting package to track unit performance more easily
- ✓ Reduced manual workflows in financial consolidation and roll-ups with automated structure of new reporting package and rolling forecast tool
- ✓ Created KPIs and new P&L format to be implemented with management