

Case Study:

Customer-Specific Analyses



Currency Exchange Software Company

Selects  **RTD INSIGHTS**  for Customer-Specific Analyses

Company and Situation Overview

- Headquartered in Eastern U.S.
- ~\$18M in annual revenue with ~15% annual revenue growth
- Founder-owned business seeking external investment

Challenges without RTD Insights

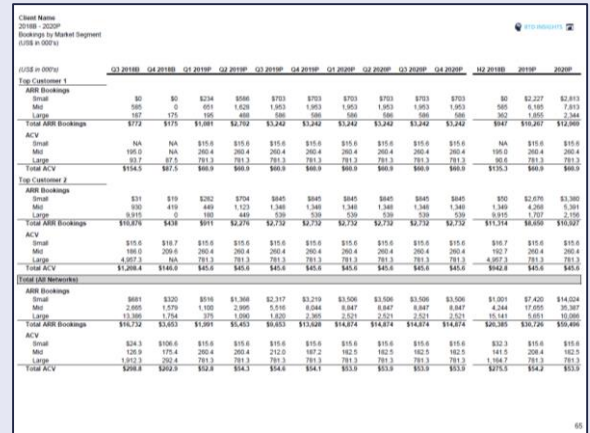
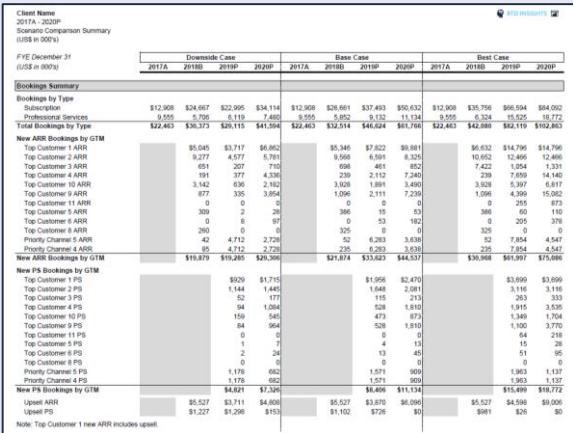
- X No CFO or internal finance team
- X Expansive and disparate datasets with no visibility into performance
- X No insight into customer unit economics (SMB vs. enterprise dynamics)
- X Unfocused, unorganized go-to-market / sales strategy

Results with RTD Insights

- ✓ 2-week turnaround to create detailed customer cohort analyses from raw data tapes to be used by COO to revamp sales processes
- ✓ RTD Insights' analyses helped identify lower retention trends among SMB customers and higher profitability among enterprise customers using online platform portal

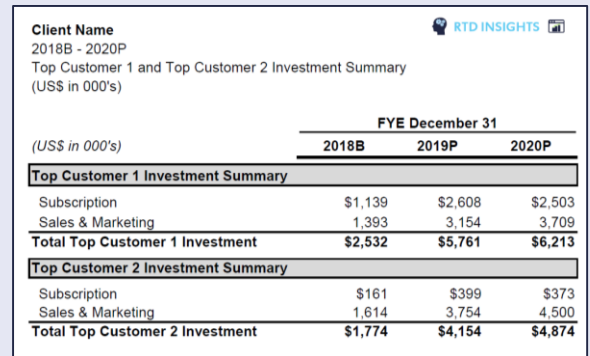
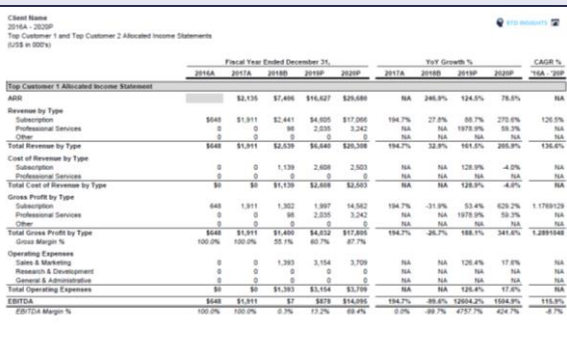


Customer-Specific Analyses Representative Screenshots



Detailed Top Customer Summaries

Bookings Performance by Customer



Allocated Income Statements

Contribution Margin Analyses

