

Case Study:

Fundraising Support & KPI Reporting



**SaaS Virtual and Remote Patient Monitoring Services Company
Selects  RTD INSIGHTS  for Fundraising Support & KPI Development**

Company and Situation Overview

- Headquartered in Midwestern U.S.
- ~\$500K in annual recurring revenue with 375+ patients and users
- Successfully raised \$2.2M+ in funding; seeking additional \$1.5M

Challenges without RTD Insights

- X Limited finance and ops function and team; one person managing all workflows in the office of the CFO and COO
- X No internal financial reporting and KPIs, resulting in limited data to be provided to early-stage investors and potential investors
- X Needing fundraising support to close \$1.5M additional seed round

Results with RTD Insights

- ✓ Worked closely with Founder and Head of Finance and Operations to enhance fundraising materials, including presentation and key data
- ✓ Created additional analyses to understand pricing strategy and potential patient / user penetration
- ✓ Implemented accounts receivable aging reporting and monitoring