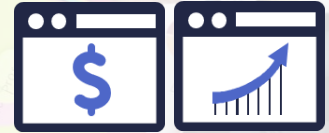


# Case Study:

## Fundraising Support & CFO Services



**SaaS Student Life and Safety Management Company Selects**  
  **for Fundraising Support and CFO Services**

### Company and Situation Overview

- Headquartered in Eastern U.S.; founder-owned, lean team of 4
- ~\$90K of ARR, seeking first round of external funding for growth
- Co-founder and CEO seeking assistance across business and fundraising

### Challenges without RTD Insights

- X CEO stretched thin and lacking capacity to manage all workflows, such as sales and marketing, fundraising, finance, and operations
- X Limited professionalization managing prospect pipeline, partnership strategy, and organization of user conference
- X Desire to expand market presence and organic customer growth

### Results with RTD Insights

- ✓ Developed internal processes and templates for weekly sales meetings, and sales pipeline monitoring
- ✓ Created value-added reseller agreement and assisted in negotiation with key software integration partner alongside CEO
- ✓ Helped team secure \$300K in capital from various angel investors