

Case Study:

Fundraising Support & FP&A Services



**Third-Party Risk Management Software Company
Selects  RTD INSIGHTS  for Fundraising Support and FP&A Services**

Company and Situation Overview

- Headquartered in Southern U.S.
- \$12M+ in annual revenue; backed by high-profile investors and VCs
- Highly accomplished management team seeking finance / ops help

Challenges without RTD Insights

- X Experienced CFO and finance / accounting team; capacity needed to help with potential Series C round and other internal initiatives
- X High-growth, fast-paced environment requiring added financial and business performance reporting
- X New VP of Sales onboarded; enhanced sales ops reporting for growth

Results with RTD Insights

- ✓ Served as VP of Finance with management and other team members to work cross-collaboratively with business lines
- ✓ Managed rolling forecasts for cash runway assessment and prepared board materials
- ✓ Implemented additional set of KPIs and new business reporting tools