

# Case Study: A Custom Solution for Data Discrepancies

*A look at how FRC assisted a private equity firm to save time and make better decisions through data intelligence.*

## At a glance...

When his CFO was spending too much time combing through data to understand why the ARR reports for a company they manage contradicts the board package financial reports, the partner of a middle-market private equity firm turned to Frank, Rimerman Consulting for a custom solution.

## Key metrics

Through strategic advice and problem solving, the company immediately felt the positive impact of working with Frank, Rimerman Consulting.



**80,000+**

Consolidated records of eCommerce data



**1 WEEK**

Time it took FRC to design a custom solution

## CHALLENGES



Issues reporting on retention, churn, contraction and expansion numbers led to discrepancies between the average annual return report and board package financials. The company also did not have the ability to report on 100s of thousands of eCommerce data from Paypal and Stripe, or the ability to remove the tax amounts of every transaction.

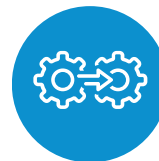
## SOLUTIONS



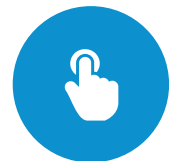
Frank, Rimerman Consulting (FRC) experts created a series of interactive dashboards and analysis tools customized for the client and their team around the country saving them time and delivering the power of more informed decision-making.



**Custom Reporting**



**System Add-on Integrations**



**Strategic Advice**

## OUTCOMES



### Visual Clarity & Consistency

1

Customizing an add-on to the company's Sage Intacct system enabled FRC to create a dashboard view that incorporates historical data and automates the aggregate each month. Now the AAR Report and Board financials are in sync.

### Time Savings

2

The custom ARR reporting solution saves the Private Equity firm CFO several hours each month and enables him to focus on strategic direction rather than data combing.

### Operational Speed

3

FRC strategic architects designed and implemented a solution in less than a week that exceeded the solution the PE firm had produced after working over 8 months.



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