

Introduction

Our proprietary diagnostic process is designed to accelerate companies to 'stage appropriate' finance & accounting capabilities. We review 250+ capabilities and prioritize based on business model and funding stage. Our report gives founders, boards, and investors better visibility and an actionable plan to building out the finance function.

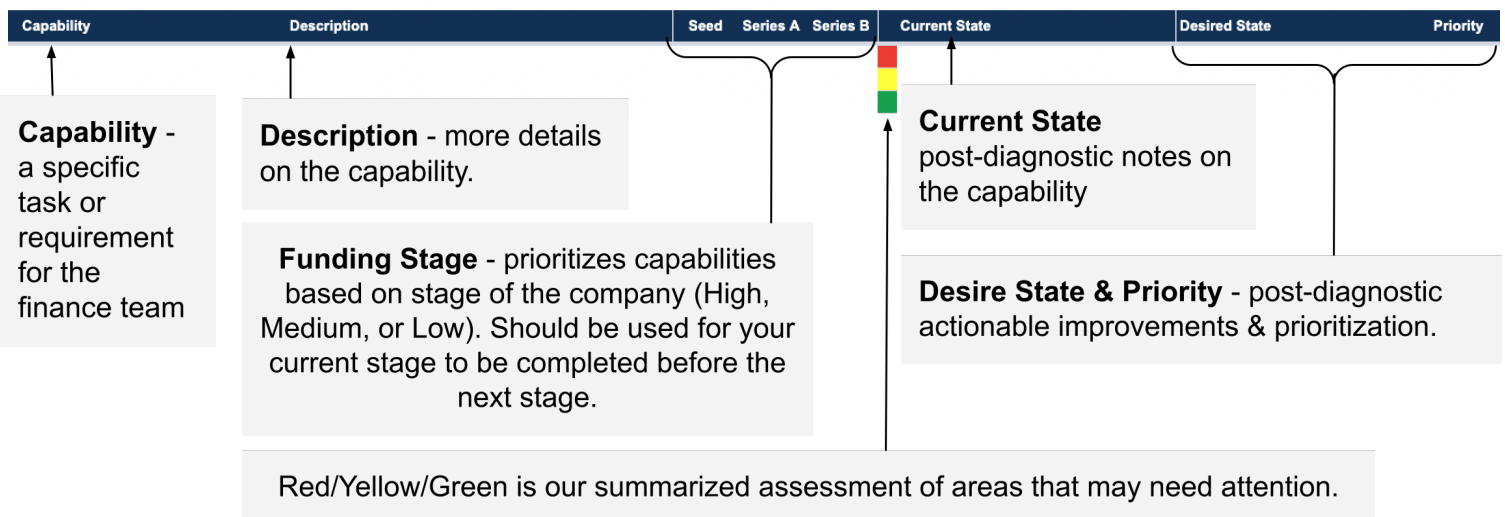
StartupEdge is able to support a range of options from highly engaged (building and running the department) to consultative (guide and train). StartupEdge provides the right level of resourcing for maximum ROI for our clients. We've seen too many cases where lack of senior oversight early creates significantly more work and cost down the road...we aim to fix that!

Steps to complete*

1. Provide access to accounting system and supporting files (if desired to save time)
2. Call to review diagnostic questions (90 minutes)
3. If necessary, call/email to confirm answers from prior call
4. StartupEdge emails written diagnostic for review
5. Call to review report and discuss Desired State & Priorities (90 minutes)

*Async option available with longer questionnaire to reduce meetings.

Diagnostic Overview



Scope

The diagnostic is divided into sections that mirror the functions within an advanced finance organization. These functions often reflect different skills and how work could be divided as the team grows.

- A. General** - Covers the basics of the Company's business model, finance tech stack, and how finance work is currently performed
- B. Operational Accounting** - Covers core tasks of running the business such as A/R, A/P, payroll, banking, etc.
- C. Financial Accounting** - Covers financial reporting and compliance with GAAP.
- D. FP&A** - Covers KPIs, budgeting & forecasting, and financial analysis.
- E. Board & Investor Relations** - Covers key reporting capabilities including weekly/monthly updates & in-depth board meetings.
- F. Tax & Compliance** - Covers federal and state taxes plus compliance matters such as state registrations.