

Streamlining the FP&A Process of a SaaS Company

ABOUT THE CLIENT

- The client is a Multinational developer of Virtual Reality (VR) and Augmented Reality (AR) software.
- They are headquartered in Irvine, California, with a global presence across Singapore, China, India, Spain, France, and the UK.
- It serves Fortune 500 companies, government organizations, and leading global universities through its proprietary multi-reality platform for immersive learning solutions and has received multiple industry awards, including the EdTech Asia Award.

BUSINESS CHALLENGES

The company was on a path of expansion and was facing challenges in evaluating performance and making strategic decisions due to the absence of proper planning and reporting methodology. A few of these challenges were:

Incomplete and inaccurate accounting data

No standard MIS reporting structure

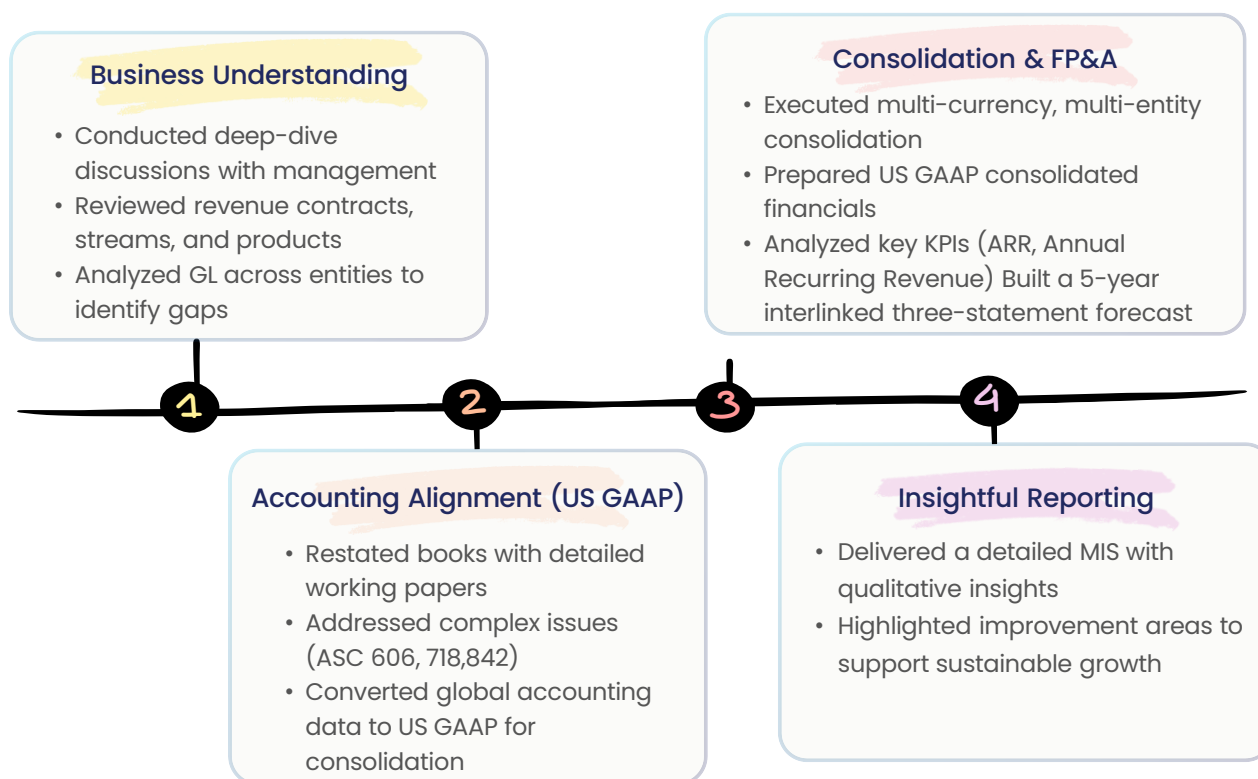
Communication and collaboration hurdles across all the entities

Lack of skilled and experienced staff in producing insightful reports

Process inefficiencies leading to delays in data processing



OUR APPROACH



VALUE CREATION

Valueonshore assisted the Company in streamlining accounting and establishing a well-defined FP&A and MIS structure. The major impact areas included –

- Ensured US GAAP-compliant accounting for audit and reporting
- Delivered ARR analysis to identify revenue leakage and upsell opportunities
- Built an accurate three-statement financial forecast supporting fundraising
- Identified and eliminated non-productive costs, improving operational efficiency

ABOUT US

Valueonshore (“VOS”) Advisors is a global business advisory firm of Big 4 alumni and industry leaders, supporting financial executives on complex, high-impact matters across accounting, M&A, risk, and managed services. Founded in 2009, the firm has grown to ~400 professionals across the **U.S.**, **India**, and the **UAE**, serving mid-cap and high-growth companies as a trusted partner in navigating complexity and driving value.

Raj Roy

Senior Vice President
raj.roy@valueonshore.com



Reshma Mehta

Vice President
reshma.mehta@valueonshore.com

