

UP  
\*  
SOURCED



# DOCK YARD\*

A global digital product consultancy serving forward-thinking clients—and looking for financial strategy to match.

DockYard needed proactive financials in line with its future focus.



## AGENCY TYPE

GLOBAL DIGITAL  
PRODUCT CONSULTANCY



## LOCATION

FULLY REMOTE



## COMPANY SIZE

60-75 EMPLOYEES

# ABOUT THE CLIENT

They're known for helping visionary teams at Netflix, Apple, Nasdaq and Harvard bring products from idea to impact. They create tech that advances digital product development with a strong, innovative culture connecting their fully remote team of 60+ employees across five countries.

That's why leadership knew when it came to their own financials, they could be looking further ahead. What could they achieve with accurate financial projections, and insight into how each of their department's decision-making impacted them? How could they better envision their own future?



**“ UPSOURCED HAVE BEEN GREAT PARTNERS. THEY’VE INTEGRATED WITH OUR EXISTING PROCESSES AS WELL AS ANY PARTNER I’VE WORKED WITH, WHILE ALSO INTRODUCING NEW PRACTICES TO STRENGTHEN OUR FORECASTING AND STRATEGY WORK.”**

MICHAEL DUPUIS  
COO

# OUR PROCESS

We met with DockYard to gain a true understanding of their goals and begin a thorough dive into the numbers. In the first months, we shared learning with internal teams to lead them into more intentional financial operations. We guided them through future-focused changes such as:

- \* New processes to better tie together operations and financials.
- \* Financial models customized for their goals, such as scenario analysis to help business development teams evaluate prospective deals, and the right tools to help client services teams see how employees impact profitability.
- \* Clear and easy communication processes to keep everyone moving forward.



**WANT TO MEET  
YOUR PROFITABILITY**

GOALS?  
GOALS?  
GOALS?

**UPSOURCED**





## OVERALL IMPROVEMENT

Now—leaders can measure true financial performance to plan the road ahead.

They can see trends over time and targets needed to meet profitability goals. Having custom financial models and clear, concise reporting gives them the ability to plan company goals two to three years into the future.

When you have big goals, good partners make an impact and the details matter. We take pride in providing value and making sure everyone's on the same page to move forward together. And most of all—we love to see our partners power into the future.

Want to set strategy that moves you ahead?

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