

UP
SOURCED
UN*



O/M*

A nimble digital product design powerhouse
takes control of its growth—so it can soar.
O/M was ready for its next step.



AGENCY TYPE

DIGITAL PRODUCT
DESIGN STUDIO



LOCATION

FULLY REMOTE



COMPANY SIZE

10-25 EMPLOYEES

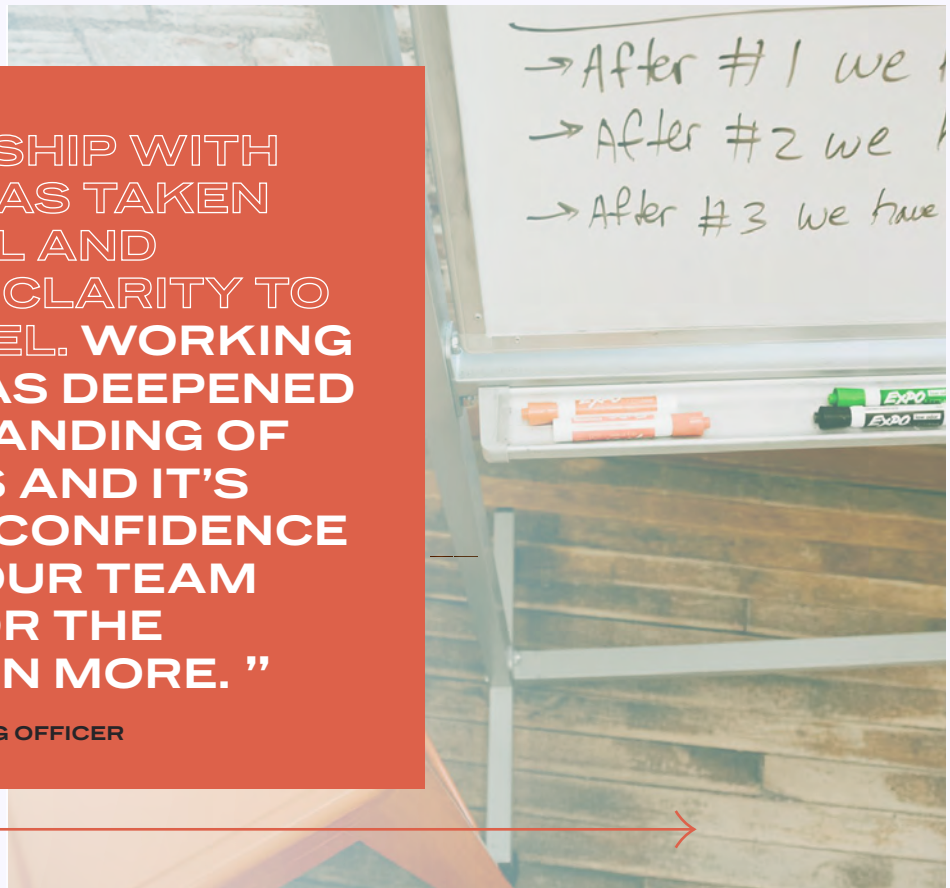
ABOUT THE CLIENT

With a client list including Google, Facebook, Instagram, Nextdoor, Stripe and various startups, O/M leadership was well-versed in how to design world-class digital products and services. With a fully remote team of 12 employees in nine states, they had nailed a mission and process that allowed them to deliver for their clients with excellence.

But they knew gaining better visibility into their financials and building more mature processes would help them keep up that momentum—and ensure each next step forward was the right one.

“OUR PARTNERSHIP WITH UPSOURCED HAS TAKEN OUR FINANCIAL AND OPERATIONAL CLARITY TO THE NEXT LEVEL. WORKING WITH THEM HAS DEEPENED OUR UNDERSTANDING OF OUR BUSINESS AND IT’S GIVEN US THE CONFIDENCE TO INVEST IN OUR TEAM AND VISION FOR THE COMPANY EVEN MORE.”

-LISA ADANG, CHIEF OPERATING OFFICER



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OUR PROCESS

We met with O/M to understand the agency's distinct vision, values and goals for the future. As we began work, we laid the right foundation for action with financial education customized to support their trajectory. We led them through future-focused changes such as:

- * New financial processes and tools for better reporting and visibility.
- * New partners to help O/M handle specific issues like tax accounting.
- * An ongoing relationship for financial guidance big and small.

OVERALL IMPROVEMENT

O/M immediately gained visibility into the percent of revenue spent on client services, sales and marketing, and administrative costs. We led conversations with individual internal teams to more accurately project sales and its effect on employee utilization, capacity and project profitability. They found answers to questions such as how much cash to hold in reserve and how to structure quarterly tax estimates.

Now—leaders can make proactive business decisions based on actionable data to support their instincts.

For example, financial models can now support their hiring decisions, showing them the impact of various scenarios based on projected revenue and hours needed to service new clients. Sales projections can be based on actual won contracts and prospective clients, which allows for more accurate planning.

O/M took control of its future. We love bringing our industry expertise to fuel these conversations with great partners—and being available every step of the way to help them continue to grow and succeed.

Want to harness your financial data to power future performance?



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