



PORTO ROCHA

A design studio that seeks to provoke meaningful change through their work.

PORTO ROCHA needed clarity surrounding the lack of visibility into financials required to make confident decisions when it came to company growth.

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AGENCY TYPE
DESIGN STUDIO

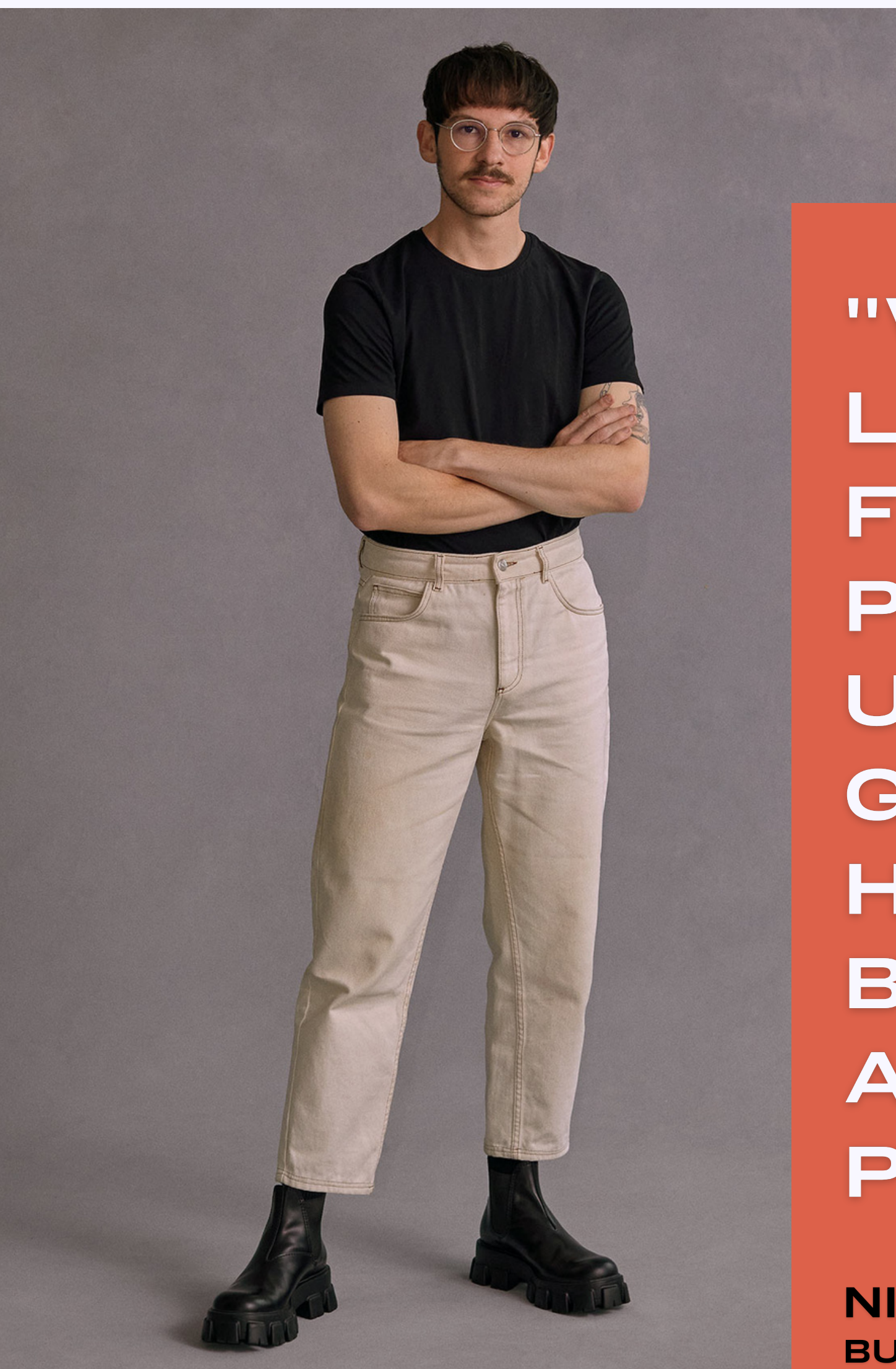
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LOCATION
NEW YORK, NY

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COMPANY SIZE
20 EMPLOYEES

ABOUT THE CLIENT

A design studio located in New York, PORTO ROCHA works with people and companies to craft branding systems, products, and experiences. They've launched brands, products, books, websites, campaigns, and experiences with clients that range from global tech and retail companies to independent artists and cultural institutions.

While the business was operating in a high-level, profitable way, PORTO ROCHA came to Upsourced seeking guidance when the studio was quickly growing and the leadership team needed to set the right financial foundation for sustainable growth. Having to spend more time on client work than the operations of the studio, they were struggling to find the time to plan for a new office space, make hires to add capacity and protect from burnout, and confidently continue growing.



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NICK SCHRÖDER
BUSINESS OPERATIONS LEAD

OUR PROCESS

We met with the Owners and Operations & Business Lead to better understand how the business' vision and values were impacting their decision-making and goals for the future. Upsourced provided more structure to the accounting operations, giving some much-needed time back to the leadership team. This time, along with new visibility into how money was being spent, led to better decision-making and allowed the leadership team to focus on other areas of the business.

What we helped with:

- * Cleaned up the financials so that we could more easily track and project trends for revenue, expenses, profit, and cash flow.
- * Worked through best practices and how to better utilize Float for time-tracking and capacity planning.
- * Created a staffing model that allowed us to forecast cost by specific roles/departments and project revenue capacity that is able to be tracked against booked and tentative projects.



“OUR TEAMS WORK IN SIMILAR WAYS, WHICH HELPS THE RELATIONSHIP AND COMMUNICATION—BEING ABLE TO SPEAK THE SAME LANGUAGE AND WORK TOGETHER TO CREATE SOLUTIONS.”

NICK SCHRÖDER
BUSINESS OPERATIONS LEAD

OVERALL IMPROVEMENT

Because of the more structured finance and accounting operations, they are able to have a better understanding of what the business forecast is and focus more on projects they're passionate about as opposed to taking on any client project that comes to them.

Once financials were cleaned up and we were able to successfully track key KPIs, we were able to work with the leadership team to look at how employee raises and bonuses would affect profits and cash flow. This enabled them to provide an overall competitive compensation package, i.e. salary, health benefits, 401(k), and bonuses, which was important to them.

PORTO ROCHA continues to be very successful, but now it's easy to identify why they are having success and how we can use that information to make sure that success is sustained. Nick stated:

**"UPSOURCED
VALIDATED OUR GOALS.
WITH THEIR SUPPORT IN
IMPROVING FINANCIAL
PROCESSES AND
UNDERSTANDING
WHERE WE WANT TO
GO AS A STUDIO, WE'RE
ABLE TO GROW MORE
CONFIDENTLY AND
SUSTAINABLY."**



Being specialized in creative agencies, we have the ability to give perspectives into what other studios are doing and share our learnings. Our clients matter to us in more than just a business transactional way. Think your studio could benefit from an additional lens? Let our team provide you with the financial clarity and peace of mind you and your team deserve.