FINANCE ADVISORY

PE-Backed Healthcare SaaS Company

ENGAGEMENT OVERVIEW

A private equity–backed, mid-market healthcare SaaS company engaged Alliance after losing confidence in its core CARR metric following a prolonged effort with prior consultants that spanned more than a year without delivering a reliable result. Persistent data quality and calculation issues within the existing Power BI ARR dashboard produced inconsistent outputs, limiting leadership's ability to forecast accurately and make informed strategic decisions.

Alliance was brought in to conduct a comprehensive audit of CARR, rebuild the metric from the ground up using contract-level data, and deliver a transparent, accurate, and decision-ready model that leadership could rely on for forecasting, board reporting, and investor communications.

[alliance]

ALLIANCE SOLUTION

Alliance provided senior-level FP&A expertise through:

01 — CARR Audit & Diagnostics

Identified calculation errors, data integrity issues, and inconsistencies within the existing Power BI ARR dashboard.

02 — Contract-Level CARR Rebuild

Recalculated CARR from raw contract data to ensure accuracy, transparency, and traceability.

03 — Executive Alignment & Validation

Partnered directly with the CFO, VP of Finance, and Senior Finance Manager to validate methodology and assumptions.

04 — Scalable Reporting Framework

Delivered a repeatable, auditable CARR model designed for ongoing internal use, forecasting, and board reporting.

CLIENT OUTCOMES

- Restored executive confidence with a fully accurate, validated, and automated CARR metric adopted as the single source of truth.
- In 2.5 months, reduced reporting risk and strengthened governance through auditable, contract-level traceability.
- Increased efficiency by eliminating manual reconciliation and inconsistent ARR and CARR outputs.