HLS Global SINGAPORE

Client Use Case

Use Case 2: Board Reporting Upgrade

From ad-hoc finance emails to an investor-grade board pack

Company Type	Challenge	Engagement
Tech Company, Series A	Inconsistent reporting, investor concern	Board Pack Design + Monthly Support

The Situation?

- Series A Tech company ~ well-funded, growing team, 3 active pilots converting to contracts
- Sends board updates via email: a few charts, a revenue number, and a written narrative
- No standard template ~ every update looks different; investors cannot track trends
- Burn and runway not reported; hiring plan not tied to cash; pipeline not quantified
- Board members flagging the lack of financial visibility in meetings; lead investor expressing concern

What HLS did?

HLS Workstream	What We Do
Board Pack Design	Single standardised monthly pack, structure agreed with founders and investors
Revenue Section	ARR / MRR waterfall, revenue by customer, new vs expansion vs churn
Burn & Runway	Total burn by category, burn vs budget, runway under base and stress scenarios
Cashflow Visibility	Cashflow forecast, updated monthly, flagging upcoming pressure points
Headcount & Hiring	Team by department, open roles, hiring plan cost vs approved budget
Pipeline & Commercial	Weighted pipeline, stage conversion rates, top-10 deal status
KPI Dashboard	8–12 operational and financial KPIs with month-on-month trend and RAG status
Risks & Decisions	Top 3 risks with owner and mitigation; decisions required from the board
Variance Commentary	Actuals vs budget with written explanation of material variances

What the Monthly Board Pack covers

Executive Summary: highlights, risks, decisions needed	**Revenue & ARR:** Waterfall
Burn & Runway: Actuals vs budget + runway chart	**Cashflow Forecast:** Forward view
Headcount & Hiring: Team growth vs plan and cost	**Pipeline:** Weighted pipeline + deal stage summary
KPI Dashboard: RAG-status KPI table with trend	**Risks & Decisions**: Top 3 risks + board action items

Outcome

- Board meetings become strategic discussions, not finance catch-up sessions
- Investors have consistent visibility into burn, runway, pipeline, and KPIs every month
- Founder spends significant less time preparing board materials, pack runs on a rhythm
- Early warning system in place, cash pressure or pipeline risk flagged 6–8 weeks ahead
- Company looks institutionally mature, de-risks the Series B fundraise