Hurdle IEDC Client Offerings

Package 1 - Access to Capital - Clients attempting to make a decision to raise capital and which type to raise

Function Area	Type	Topic	Structure
Goal Setting Meeting	In-person, one time	Gives the client an opportunity to build comfort with the Hurdle team members but also serves as a foundational element in our relationship. We will use the goals set in this discussion to inform later financial decisions.	Conversational discussion, and information session and goal setting exercise
Financial Model Build + Revisions	Hurdle deliverable	Hurdle creates solid financial plan to deeply understand the company's financial position and potential for capital raise	Hurdle works with the company's accountant to receive company numbers and then creates a model that the leaders can iterate on with our support. We will communicate async via email and chat
Financial model + raise opportunities Advising	Virtual Sessions	Review of financial model findings and opportunities for raise	Conversational discussion and working and advising session

Package 2 - Access to Capital (fundraising) - Clients who have made the decision to raise capital

Function Area	Type	Topic	Structure
Goal Setting Meeting	In-person, one time	Gives the client an opportunity to build comfort with the Hurdle team members but also serves as a foundational element in our relationship. We will use the goals set in this discussion to inform later financial decisions.	Conversational discussion, and information session and goal setting exercise
Financial Model Build + Revisions	Hurdle deliverable	Hurdle creates solid financial plan to deeply understand the company's financial position and potential for capital raise	Hurdle works with the company's accountant to receive company numbers and then creates a model that the leaders can iterate on with our support. We will communicate async via email and chat
Business Plan Template + Revisions	Hurdle deliverable	Hurdle team creates a template based on initial meeting with client and what we find in the financial model	Communicate async via gmail
Business Plan Advising	Virtual Sessions	Review drafts from client and advise client on best path forward depending on their goals	Two (2) thiry (30) minut meetings
Fundraising deck or loan document preparation support	Hurdle deliverable	Hurdle will put together required materials and advise for the company related to fulfilling loan requirements or for investor meetings and help translate them into presentation-ready materials	Communicate async via gmail
Fundraising and/or loan application advising	Virtual Session	Review loan/investor meeting materials, answer questions, align on numbers and strategy	Conversational discussion and working sessions

Package 3 - Maintaining Capital - Clients who have already raised capital

Function Area	Type	Topic	Structure
Goal Setting Meeting	In-person, one time	Gives the client an opportunity to build comfort with the Hurdle team members but also serves as a foundational element in our relationship. We will use the goals set in this discussion to inform later financial decisions.	Conversational discussion, and information session and goal setting exercise
Financial Model Analysis	Hurdle deliverable	Hurdle reviews company's current model to deeply understand the company's financial position and potential for capital raise	Communicate async via gmail
Financial Model Advising	Virtual Sessions	Review of financial model findings and opportunities for capital raise, headcount planning, and profitability opportunities	Conversational discussion and advising and working session
Capital Planning Advising	Virtual Sessions	Information sessions and review of financial options and alternatives	Conversational discussion and advising and working session
Headcount Planning Deliverable	Hurdle deliverable	Work with the team to understand their hiring needs and prepare a model that supports their needs and financial goals	Communicate async via gmail
Monthly Variance Analysis	Hurdle deliverable	Hurdle team prepares financial month end and performs an analysis on where and why the company beat or missed plan	Communicate async via gmail