



NASDAQ-READY CONSOLIDATION

# SOLVING CONSOLIDATION FOR A NASDAQ-LISTED GROUP WITH INSIGHT MATTERS

QUICKBOOKS ONLINE

MULTI-ENTITY CONSOLIDATION

SEC REPORTING

IPO-READY

MULTI-CURRENCY

## AT A GLANCE

### "That's how important it is."

How Rob te Braake and Insight Matters cut a Nasdaq-listed group's month-end consolidation from days to 30 minutes, turning a complex SEC-grade audit challenge into a fast, scalable process powered by Joiin and QuickBooks Online.

**30** mins

First post-IPO group report, end to end

**44**

QuickBooks Online entities consolidated

**8**

Key clients on Joiin today

**1**

Nasdaq-listed holding company onboarded ahead of IPO

## THE CHALLENGE

### Days of manual work, every single month.

Ahead of IPO, a Nasdaq-listed holding company engaged Insight Matters to manage complex group reporting across **multiple QuickBooks entities, currencies, and SEC standards.**

Rob expected days of manual work each month just to get the consolidation right, long enough to make a public-market reporting cadence look impossible.



We wouldn't even recommend a client to have multiple entities without a tool like Joiin in place. It's that important.



**Rob te Braake**  
Founder, Insight Matters

## THE SOLUTION

### Tailored report packs, real-time data, one source of truth.

Using Joiin, Insight Matters built tailored report packs for both **management and audit** use. Real-time data from QuickBooks Online enabled fast, consistent group reporting, cutting consolidation time post-IPO to just 30 minutes.

Clients access live, view-only reports while setup and updates are managed centrally. The in-house CFO now builds confident board packs in Joiin, backed by accurate, consolidated data and a streamlined process.

## ABOUT INSIGHT MATTERS

### CFO-level support for fast-growing businesses.

Insight Matters is a financial services firm providing CFO-level support to fast-growing businesses, from digital agencies to crypto ventures. Using Joiin, the team manages consolidated reporting across 44 QuickBooks Online entities for 8 key clients, delivering strategic insight and audit-ready compliance.

[financeinsightmatters.com](https://financeinsightmatters.com) →





— FEATURED ENGAGEMENT

# From days of manual work to a 30-minute Nasdaq close.

NASDAQ-LISTED HOLDING COMPANY · PRE- & POST-IPO

SEC READY

## One consolidated pipeline, every entity, every standard.

Facing the demands of Nasdaq-level reporting, Insight Matters turned to Joiin to consolidate the group's QuickBooks Online entities. Their **first post-IPO group report took just 30 minutes**, turning a complex audit challenge into a fast, scalable process.

Real-time data, multi-currency handling and SEC-grade structure meant Rob's team could stop rebuilding the consolidation every month, and start focusing on review, analysis and the questions that actually matter to the board.

### Days → 30 min

Consolidation time, before vs. after Joiin

### 1-2

People delivering the entire group pack

### SEC

Audit-ready packs, with full traceability



#### Automated consolidation

Real-time data pulled from every QuickBooks Online entity, with eliminations, FX and group structure handled in one place.



#### Customisable reports

Statement structures tailored to the audit committee, the board, and the SEC, without rebuilding the pack every month.



#### Real-time dashboards

Live, view-only access for finance leaders. They drill into entities, variances and ledgers themselves, no email round-trips.



What once took days now takes 30 minutes. That changes what a finance team can take on.

**Rob te Braake** · Founder, Insight Matters

## The benefits, in numbers

Three outcomes Insight Matters can point to today.

### 30 mins

Down from days. Faster month-end close, powered by automated consolidation across QuickBooks Online entities.

### 100%

Audit-ready. Structured report packs deliver everything needed for SEC compliance, with built-in traceability.

### Live

Real-time group insights. Dashboards built from Joiin give stakeholders the clarity they need to decide.

#### LOOKING AHEAD

## Multi-entity, multi-GAAP, without a tool like Joiin, Rob says don't.

Insight Matters now runs 44 QuickBooks Online entities for 8 key clients on Joiin, from digital agencies to crypto ventures and a Nasdaq-listed holding. The same pipeline that took a complex IPO close to 30 minutes scales to every other group on the roster.

TRY IT FREE

"It's that important."

Start free trial →