



# Dream Team for Fund Raise

A guide on building a high performing team for VC/ PE fund raise and IPO

## **Contents:**

Building a high performing team for:

1. VC/ PE Fundraise
2. IPO

## 1. Private Fund Raising – VC and PE

Role	Requirement	Key Skills Required
<b>Finance Head</b>	A skilled finance head is essential for a company seeking funding as they can effectively manage financial resources, create credible projections, and articulate the company's financial story to potential investors, thereby increasing the likelihood of securing investment and ensuring sustainable growth.	<b>Primary Skills</b> Investor Relations, Finance Controlling, Treasury, FP&A, Tax and Compliance
<b>FP&amp;A</b>	FP&A Managers provide accurate financial forecasts, strategic insights, and data-driven analysis that not only support informed decision-making but also build credibility with potential investors by demonstrating the company's financial viability and growth potential.	<b>Primary Skills</b> Budgeting, Costing, Cost Control, Benchmarking, Reporting, MIS, Business Partnering
<b>CS and Legal</b>	Company Secretary (Compliance) and Legal Managers ensure regulatory compliance, manage legal risks, and provide strategic guidance on corporate governance, thereby enhancing the company's credibility and attractiveness to potential investors.	<b>Primary Skills</b> Contract Management, Share Holder Agreements, Labour Laws, Compliance, Companies Act
<b>HR Manager</b>	Competent HR Managers ensure the organization functions professionally and is not driven by founders' whims and fancies. They ensure that the company has the right talent, culture, and people strategies in place to drive growth and innovation, thereby increasing investor confidence in the company's ability to scale and succeed.	<b>Primary Skills</b> Talent Acquisition, Employee Engagement, Corporate Communications, HR Ops, Performance Management

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## 2. IPO – Initial Public Offer

Role	Requirement		Key Skills Required
<b>CFO</b>	A competent CFO is crucial for an IPO-bound company, ensuring financial transparency, regulatory compliance, and effective investor relations. They play a pivotal role in shaping the company's valuation, managing risks, and guiding the organization through the complex IPO process	<b>Primary Skills</b> <b>Management Skills</b> <b>Soft Skills</b>	Investor Relations, Industry Knowledge, Business Acumen, Valuation, Handling Roadshows, Project Management Finance Controlling, Treasury, FP&A, Tax and Compliance, Risk Good connections with Bankers, Auditors and External Consultants, Excellent Communication
<b>Company Secretary</b>	A competent company secretary is crucial for an IPO-bound company, as they ensure regulatory compliance, manage documentation, and facilitate the entire process, leveraging their expertise in corporate governance, legal requirements, and stakeholder communications to ensure a successful public offering	<b>Primary Skills</b> <b>Soft Skills</b>	Companies Act, SEBI, LODR, Stock Exchange Communications, DRHP, Corporate Governance, Financial Acumen Communication with various stakeholders, including merchant bankers, auditors, and legal counsel, Attention to details
<b>Investor Relations Head</b>	A skilled Investor Relations Head is crucial for a company launching an IPO as they ensure transparent communication with investors, build trust, and effectively convey the company's value proposition, thereby attracting the right investors and achieving fair valuation	<b>Primary Skills</b> <b>Soft Skills</b>	Valuation, Industry Knowledge, Investor and Media connects, IPO process, Data visualisation and presentation Communication, Convincing Skills, Relationship Management
<b>Internal Audit Head</b>	Building investor confidence and meeting strict listing requirements require having a strong Internal Auditor who can ensure internal controls, financial integrity, and regulatory compliance	<b>Primary Skills</b> <b>Soft Skills</b>	Risk, Controls, IT risk, Fraud Risk, Compliance overview, Board reporting, Industry Knowledge Critical thinking, Observation, Independence

Role	Requirement		Key Skills Required
<p><b>Group Finance Controller</b></p>	<p>A skilled Group Finance Controller is crucial for a company preparing for an IPO, as they ensure accurate financial reporting, robust internal controls, and compliance with regulatory requirements. Their expertise in managing financial operations and risk mitigation is essential for building investor confidence and facilitating a successful public offering.</p>	<p><b>Primary Skills</b></p> <p><b>Management Skills</b></p> <p><b>Soft Skills</b></p>	<p>Financial Reporting, Consolidation, Ind AS, Direct Tax, M&amp;A Tax, Budgeting, Forecasting, Treasury</p> <p>Finance Ops, Statutory and Internal Audit</p> <p>Attention to details, team management, pressure handling</p>
<p><b>FP&amp;A Head</b></p>	<p>Investors are cautious about projections presented by the company. A good FP&amp;A Head ensures accurate and realistic forecasting, budgeting, and financial modelling, thereby building investor trust. They also focus to optimize resource allocation, ensure minimum revenue leakages and cost reduction.</p>	<p><b>Primary Skills</b></p>	<p>Budgeting, Costing, Cost Control, Benchmarking, Reporting, MIS, Business Partnering, Variance Analysis and Management</p>
<p><b>HR Head</b></p>	<p>A good HR Head is essential for a company bringing an IPO in India as they ensure robust governance, talent acquisition, and cultural alignment, which are critical for meeting regulatory requirements and fostering investor confidence. Their leadership can significantly impact post-IPO growth and organizational stability.</p>	<p><b>Primary Skills</b></p> <p><b>Management Skills</b></p>	<p>Corporate Communications, HR Policies, Employer Branding, Rewards and Recognition, Org Structure Development, HR Analytics</p> <p>Talent Acquisition, Employee Engagement, HR Ops, Performance Management, Business Partnering</p>

Role	Requirement	Key Skills Required
<p><b>Independent Directors</b></p>	<p><u>Regulatory Requirement:</u> Every listed public company is required to have at least one-third of its total number of directors as independent directors. They ensure compliance, corporate governance and risk management.</p> <p><u>Strategic Guidance:</u> Independent directors bring diverse perspectives, industry knowledge and external expertise to board discussions.</p>	<p><b>Primary Skills</b></p> <p>Risk and Fraud Management, Ethical Standards, Industry Knowledge, Corporate Governance, Conflict Resolution, Crisis Management</p>
<p><b>Audit Committee Members</b></p>	<p>Good audit committee members are crucial for companies launching an IPO in India as they ensure financial reporting accuracy, regulatory compliance, and robust internal controls, boosting investor confidence and corporate governance standards.</p>	<p><b>Primary Skills</b></p> <p>Finance and Compliance Understanding, Audit Oversight, Business Acumen, Risk and Fraud Management</p>

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## External Advisors

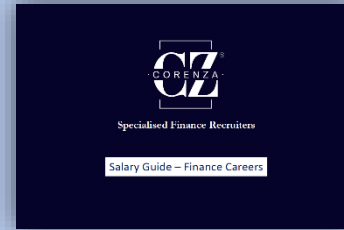
Advisors	Requirement
<p><b>Merchant Bankers</b></p>	<p>A good merchant banker is crucial for a company's IPO in India as they manage the entire process, including due diligence, regulatory compliance, valuation, underwriting, marketing, and post-listing activities like market-making, ensuring a successful and smooth public offering. Their expertise significantly impacts investor confidence and the IPO's overall success.</p>
<p><b>Statutory Auditors</b></p>	<p>Statutory Auditors play a crucial role in an IPO process by auditing and restating the company's financial statements, preparing reports on special tax benefits, and ensuring compliance with regulatory requirements. Their expertise and credibility are essential for enhancing the reliability of financial information disclosed in the IPO prospectus, which is critical for investor confidence and capital allocation efficiency.</p>
<p><b>Internal Auditors</b></p>	<p>Internal auditors are crucial for companies preparing for an IPO in India, ensuring regulatory compliance, strong internal controls, and transparency. They help establish a pre-IPO SOX framework, mitigate risks, and enhance investor confidence, which is essential for a successful public offering.</p>
<p><b>Legal Advisors</b></p>	<p>A good legal advisor is crucial for a company bringing an IPO in India as they ensure compliance with SEBI regulations, conduct due diligence, draft accurate offer documents, and mitigate legal risks, thereby enhancing investor confidence and facilitating a smooth IPO process.</p>
<p><b>Registrar and Share Transfer</b></p>	<p>A good Registrar and Share Transfer Agent (RTA) is crucial for a company bringing an IPO in India as it ensures smooth issuance of securities, accurate maintenance of shareholder records, and efficient handling of share transfers. The RTA's role in processing applications, determining allotment, and managing investor records is vital for the success and compliance of the IPO process.</p>

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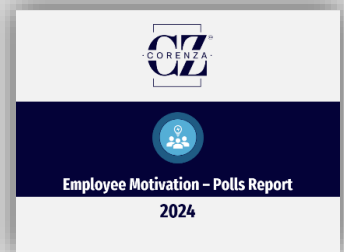
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