

Turning a SaaS sales org's pipeline data into a decision tool that it can act on every week

Topics

Data Management and analytics
Fractional & Interim Decision Intelligence & AI
Fractional & Interim Finance and Analytics
KPI dashboard development

Industry

Technology, Media,
Telecommunications
& Software

Team Size

3 members: Decision
Intelligence & AI
Lead, FP&A Manager
/ Sr. Analyst

Duration

1 year and ongoing –
weekly cadence

Situation

A PE-backed employee benefits SaaS company engaged Growth Operators to turn reliable CRM data into a standardized, executive-ready reporting tool. The organization lacked a consistent way to run weekly pipeline reviews, resulting in manual reporting, uneven visibility, and no scenario planning. They engaged Growth Operators to build it.

Execution

During our engagement, the Growth Operators team:

- Built an AI-powered weekly reporting system using CRM exports
- Implemented manager-level guardrails to separate rep and leadership views
- Created an AI-driven close-rate scenario planner modeling floor, plan, and stretch outcomes across regions, with large deals isolated to avoid skewing results.
- Packaged all outputs into a reusable reporting system that generates dashboards, narratives, and scenario models in hours instead of days.

Result

The client reduced weekly reporting time by over 60% while gaining a unified, AI-driven sales reporting package covering pipeline health, channel performance, and scenario planning. With improved visibility into close-rate risk and multi-scenario quota modeling, leadership can now identify gaps earlier and run more disciplined, scalable forecasting.