

FEATURED SUCCESS STORY:

Drive effectiveness of Operational Planning for a \$1b+ IT managed service company

PROBLEM STATEMENT:
Client had challenges in aligning operational planning across Sales, Finance and Operational and impacting revenue and profits



CHALLENGE

- Client missing revenue and margin forecasts
- Multiple forecast cadence across – Sales, Finance, Operations
- Poor revenue visibility and connect to pipeline
- Unable to drive accountability across various silos for operational performance
- Reps frustrated with manual work
- Forecast build up done with google sheets and excel



SOLUTION

- Implemented integrated solution for Territory & Account Planning, Revenue Forecasting and Demand Forecasting
- Revenue forecast formed basis for demand and cost plans
- Digitized account plans in Salesforce with real-time CRM and external intelligence along with financial forecast incorporated
- Revenue forecasting automated in Salesforce with backlog information from contracts system and actuals from ERP. Output pushed to Hyperion planning



RESULTS

- Integrated view of forecasts all the way from Sales to Revenue and demand, helped improve organizational visibility into performance
- Manual excel/google sheet forecasts cut down 8-10 hours of time per rep
- Uncovered in-efficiency and low productivity in areas like dispatch services, resulting in identification of multi-million cost savings
- Early visibility into revenue and cost gaps helped BU leaders address gaps and prepare mitigation plans to address these gaps

FEATURED SUCCESS STORY:

Revenue Forecasting for a global BPO company (\$500M+ revenue) owned by Private Equity

PROBLEM STATEMENT:
Leveraging Salesforce to produce accurate revenue forecast and plan ramp up in various Delivery centers across the globe



CHALLENGE

- Poor visibility into revenue and demand forecast
- Missed opportunity and delays in ramp up at key global delivery centers
- Finance and Sales plans in silos resulting in missed revenue
- COO driven initiative to get a consolidated view of forecasts



SOLUTION

- ForecastEra set up algorithms for revenue forecast in sales force based on estimated ramp up plans by delivery center
- Based on commit opportunities in Salesforce, automated revenue schedules were generated
- Weighted forecast for pipeline not in commit stages
- Each delivery center was able to see ramp up plan by key business area



RESULTS

- COO started using ForecastEra tool to drive revenue and cost decisions
- Finance leveraged revenue forecast pulls on a real-time basis for reporting to private equity owners
- Improved ramp up time by upto 12 days as each delivery center was able to see ramp up plan by key business area.