

# Into cognism's Success Story

**Boost clarity:** align revenue assumptions  
and headcount forecasts



Curious for more?  
**Contact us!**

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## Boost clarity: align revenue assumptions and headcount forecasts

**Solid foundation**  
for a phased project  
implementation



**Resulting in**

+ improved operational efficiency

+ financial planning accuracy

Founded in 2015 with headquarters in London, our client is a **leader in international sales intelligence**, setting a new standard for data quality and compliance.

Trusted by over 1800 revenue teams worldwide, the client is **renowned for its innovative solutions** and global reach.

**This two-phase project was delivered by a global team.** The first phase involved a revenue operations ("RevOps") implementation in EMEA, establishing a solid foundation for streamlined operations.

The second phase was a 12-week core **financial planning and analysis** ("FP&A") implementation. This phase was a collaborative effort with team members located across three time zones in the US and Poland, ensuring comprehensive coverage and expertise.

## Challenges



### Disconnected Processes

RevOps and FP&A processes were disjointed, managed in clunky Excel spreadsheets that were prone to errors.



### Change Management

Any adjustments required significant manual modifications, adding to the complexity and risk of errors.



### Slow Response Time

Limited ability to react promptly to changes in the market, due to the nature of the existing processes.



### Manual Effort

Labor-intensive manual activities exacerbated data integrity issues, making the workflow inefficient.

## The Keyrus Approach



Partnered with client to enable cross-functional business ownership.



Integrated NetSuite, HiBob, and Salesforce for data sharing.



Fostered team involvement and cohesive operations.



Created dashboards for OPEX and headcount planning.



Automated RevOps data consolidation for streamlined forecasting.



Supported consistent, accurate financial statement reports.

## Key Results & Benefits



Maintained **traceability and adaptability**, providing a robust planning framework that meets evolving client needs.

### Flexible Planning



### Comprehensive Data Integration

Developed models connecting **over 20 reports from 3 data connectors** and various flat files, ensuring data accessibility.



### Productivity Boost

**Automated daily Salesforce loads** for 14 reports and 8 scenarios, saving an hour each day and improving efficiency.

### Efficient Forecasting

Utilized **10 forecast methods** with manual input overlays, balancing efficiency and accuracy in planning.





**Thank you**  
for exploring our  
customer story!

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