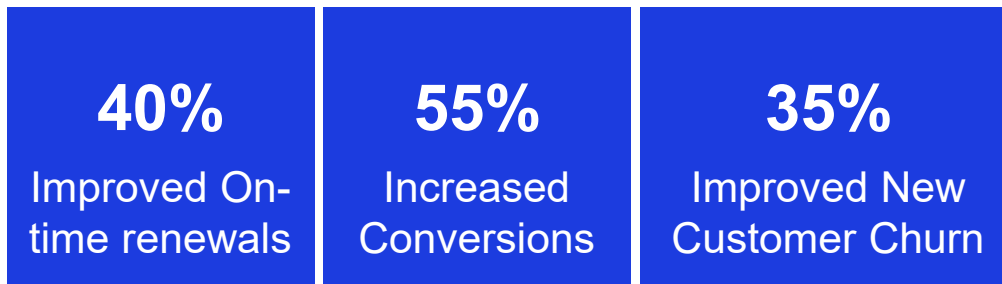


Mapping the End-to-End new customer journey delivered insights leading to improved margins and increased revenue.

Case Study: ~\$25M Vertical Business Management Software

SoftwareCo needed to improve revenue predictability, customer retention, and financial infrastructure.

Value impact



- ▶ **Mapping the lead to closed-won funnel** provided actionable insights. We discovered issues creating bottlenecks in customer conversion.
- ▶ Created **cohort reporting by customer segment** to track end to end journey of new customers. These insights led to multiple Customer Success improvements driving immediate long term business value.

<p>Increased Gross Margins negotiating carrier contract.</p>	<p>Increased revenue negotiating new payment processor partner contract.</p>
<p>Increased Gross Margins by reducing wasted SMS volume sent.</p>	<p>Increased revenue by identifying causes of high churn in 1st 90 days.</p>

- ▶ **Negotiated transformative new payments partner** contract, Card Connect, increasing margin and providing a new source of top of funnel opportunities.
- ▶ **Negotiated new Twilio contract** by purchasing three-year minimum commitments. Cost reduced ~50% allowing for “free” bundling of SMS into monthly subscriptions and increasing new logo conversion rates.

We are looking for a few great businesses to improve stability, predictability and profitability.

Ready to Start a Conversation?



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Function and Specialization

Peter O'Brien is the owner of Digital Finance, LLC, living in Charleston, SC. Peter is a seasoned CFO advisor with over 20 years of experience in private equity and VC backed technology and software companies.

He has a proven track record in complex situations, diligence, operating model design, system implementations, and post-acquisition integration.

Peter has consistently led and transformed finance functions, driving significant growth and scalability in various organizations.

Education

B.S. from Marquette University
CPA from State of California