

GTM TRANSFORMATION

# Our Forecast Was Wrong Every Quarter — Three CRMs and Everyone Sandbagging

How a revenue operations partner unified three CRM platforms and installed forecast discipline across a post-acquisition SaaS organization — eliminating sandbagging, improving pipeline accuracy 19 points, and accelerating deal velocity by 31%.

PE-BACKED SAAS

GTM TRANSFORMATION

FORECAST ACCURACY

SALES OPS

**+19 pts**

PIPELINE ACCURACY

**-17 pts**

FORECAST VARIANCE

**+28%**

SALES PRODUCTIVITY

**-3.5 pts**

ANNUAL CHURN

**+10 pts**

WIN RATE

THE SITUATION

A PE-backed SaaS company with \$40M ARR had acquired two smaller competitors over 18 months. Revenue grew on paper, but the go-to-market function fragmented: three different CRM systems, sales teams operating with competing playbooks, no unified pipeline governance, and AEs systematically sandbagging forecasts to avoid accountability.

- Three siloed CRM platforms with no integrated view of customer journey
- Sales leadership flying blind: pipeline visibility was tribal knowledge, not data
- Forecast accuracy: AEs buried deals in later stages to avoid miss pressure, actual close rates bore no resemblance to stated probabilities
- Deal velocity dragging: no standardized processes meant every deal path looked different, extending cycles from 50 to 65+ days
- Churn ticking up from acquisitions: new customers weren't seeing a unified GTM experience, retention declining to 12% annually

THE APPROACH

The CEO brought in a revenue operations partner as the GTM specialist, operating under KeyDelta's VOOCs execution framework to unify and systematize the sales organization:

- 1 Audit & Standardize Data**  
Mapped all three CRM instances and source-of-truth data. Identified gaps, duplicates, and manual workarounds. Built a unified data model and migrated clean data to a single platform.
- 2 Install Pipeline Governance**  
Defined consistent deal stages, probability calibration rules, and forecast methodology. Tied every stage to documented qualification criteria and required artifacts (discovery call notes, pricing, technical validation).
- 3 Build Cadence & Accountability**  
Weekly pipeline reviews by segment, monthly forecast accuracy metrics, and quarterly business reviews tied to attainment. Made visibility and accountability non-negotiable.
- 4 Optimize & Scale**  
Deployed playbooks and templates for consistent deal execution. Built dashboards accessible to leadership and AEs. Trained teams on new methodology and embedded processes into existing compensation.

THE RESULTS — 9 MONTHS

<p><b>PIPELINE ACCURACY</b></p> <p><b>68% → 87%</b></p> <p>Data-driven visibility replaces guesswork</p>	<p><b>FORECAST VARIANCE</b></p> <p><b>28% → 11%</b></p> <p>Sandbagging eliminated; discipline installed</p>	<p><b>SALES PRODUCTIVITY</b></p> <p><b>\$450K → \$577K/AE</b></p> <p>+28% revenue per AE per year</p>	<p><b>DEAL VELOCITY</b></p> <p><b>65d → 45d</b></p> <p>31% faster deal progression</p>	<p><b>ANNUAL CHURN</b></p> <p><b>12.0% → 8.5%</b></p> <p>Unified GTM improves retention</p>	<p><b>AE RETENTION</b></p> <p><b>Declining → Stabilized</b></p> <p>Forecast discipline + fair quota relief reduced flight risk across sales team</p>
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WHY IT WORKED — THE KEYDELTA VOOCs LENS

<p><b>V VISION</b></p> <p>One GTM engine across acquired entities — consistent playbooks, unified pipeline, single source of truth.</p>	<p><b>O OUTCOMES</b></p> <p>Pipeline accuracy and forecast variance became the north star metrics. Every process change tied to reducing variance and improving accuracy.</p>	<p><b>O OWNERSHIP</b></p> <p>Sales leader owned forecast; RevOps partner owned data integrity and governance; AEs owned forecast discipline within their territories.</p>	<p><b>C CADENCE</b></p> <p>Weekly pipeline reviews surfaced forecast risks early. Monthly accuracy scorecards tied individual AE performance to probability calibration.</p>	<p><b>S SCALE</b></p> <p>Playbooks, templates, and dashboards survived the revops partner's transition — the system runs without depending on any single person.</p>
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**HOW A KEYDELTA ENGAGEMENT RUNS**

Week 1-2 Diagnose & baseline → Day 30 First outcome, ownership installed → Day 60 Cadence operating → Day 90 System running → Month 6+ Scale & compound

“Post-acquisition chaos is normal. What's not normal is leaving it that way. Three CRMs was a data problem with a people consequence — teams couldn't trust the pipeline, so they hedged their bets and sandbagged. We didn't hire more salespeople. We installed an operating system that made the data trustworthy, and the rest followed.”

— OPERATOR-ADVISOR REFLECTION · KEYDELTA ADVISORY

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