

FOR POST-MERGER CFOS & INTEGRATION LEADS

Technical Integration Is 'Done.' Your Numbers Are Still Fiction.

Three engagements where the deal closed, the systems came together, and the operating model didn't. Shared language, shared forecast, shared playbooks — or it didn't work.

WHY THESE CASES, IN THIS ORDER

Integration success doesn't come from the same CRM. It comes from the same definitions. These three cases show how to install operating language, unified forecasting, and a single delivery methodology across combined entities — usually inside 90–120 days.

INSIDE THIS PACKET

Post-Merger Global Integration

"Technical integration done, Q2 still fiction"

\$180M pipeline made real · shared language in 30 days

GTM / RevOps Transformation

"Three CRMs, everyone sandbagging the forecast"

Forecast accuracy +19pts · deal velocity +31%

Professional Services Transformation

"Five acquisitions, five playbooks, margin eroding"

Win rate 2x · margin +12pts · unified OS

THE KEYDELTA OPERATING MANTRA

Define it. Measure it. Own it. Close it. Scale it.

Which of these looks most like your situation?

Fixed-scope engagements with milestone gates. Pause or extend at any checkpoint.

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GLOBAL INTEGRATION & OPERATING SYSTEM BUILD

Technical Integration Was 'Done.' Our Q2 Numbers Were Still Fiction.

How an operator-CEO discovered that technical integration masked a deeper problem — five companies using the same words to mean different things — and built the shared operating language that made a \$180M pipeline real. Definition gaps surfaced in the first joint planning session; shared dictionary operational within 30 days.

- POST-MERGER
- GLOBAL OPS
- FINANCIAL INTEGRATION
- CLOSE ACCELERATION

5→1
COMPANIES UNIFIED

1,400
EMPLOYEES ALIGNED

3
CONTINENTS

\$180M
PIPELINE RECONCILED

6 wks → 8 days
QUARTERLY CLOSE CYCLE

THE SITUATION

Five companies had merged into one global cloud infrastructure and hosting provider (\$400M+ revenue, mid-market and enterprise segments) — 1,400 employees across three continents. The technical integration was complete: systems consolidated, networks unified, data flowing. The CEO raised a glass: 'We are now one company.' On paper, they were. In practice, they were still five.

- Three regions defined 'enterprise' differently — Americas: 5,000+ employees, EMEA: 1,000+, APAC: 500+. Same word, three meanings
- Revenue calculated three different ways — at signing, at invoice, at payment receipt. \$180M pipeline was actually three incomparable numbers
- Corporate target of 2,000 new logos interpreted as enterprise contracts, SMB signups, and account activations by different regions
- Finance spent weeks reconciling numbers that couldn't be summed — Q2 results were fiction wrapped in a spreadsheet
- Technical integration was complete but operating language wasn't integrated — teams couldn't collaborate because they weren't speaking the same language

THE APPROACH

The board believed the integration was complete — systems were consolidated. The Five Whys exposed a deeper layer: the integration wasn't a technology problem — it was a definition problem. You can't run one company if people mean different things by the same words:

- 1 Stop and Listen**
Halted the joint planning session when it became clear each region was presenting strategy using the same vocabulary with different definitions. Mapped every term that varied: customer, enterprise, revenue, pipeline, target.
- 2 Build the Shared Dictionary**
Defined every key operating term with one company-wide meaning. Enterprise = X. Revenue = calculated at Y. Target = measured by Z. No more regional interpretation.
- 3 Reconcile the Numbers**
Rebuilt the pipeline, forecasting, and reporting using unified definitions. Finance could finally produce numbers that meant the same thing globally.
- 4 Install Operating Cadence**
Weekly and monthly reviews using the shared language. Regional leaders accountable to the same metrics, measured the same way, reviewed on the same cadence.

THE RESULTS — 9 MONTHS

<p>DEFINITIONS</p> <p>3 per term → 1 Shared operating language</p>	<p>PIPELINE</p> <p>\$180M → \$112M qualified Close rates 2x within 6 months</p>	<p>FINANCE CLOSE</p> <p>6 wks → 8 days Quarterly close accelerated 80%</p>	<p>REGIONS</p> <p>5 strategies → 1 Unified GTM approach</p>	<p>CUSTOMER EXPERIENCE CONSISTENCY</p> <p>Regionally Divergent → Globally Consistent Shared definitions of SLA, enterprise, and success produced a single buying experience across continents</p>	<p>EMPLOYEE ALIGNMENT (PULSE SURVEY)</p> <p>Fragmented → Unified Shared operating language translated directly into cross-region collaboration and employee clarity</p>
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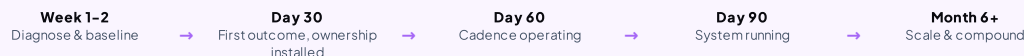
THE VOOC'S LENS — WHY SHARED LANGUAGE PRECEDED EVERYTHING

<p>V VISION</p> <p>One company, one language, one set of numbers that mean the same thing whether you're in Houston, Paris, or Singapore.</p>	<p>O OUTCOMES</p> <p>Every region measured against the same metrics with the same definitions. No more 'we hit our target' when targets meant</p>	<p>O OWNERSHIP</p> <p>Each regional president owned their number — but the number was defined once, measured one way. Ownership</p>	<p>C CADENCE</p> <p>Monthly global reviews using unified metrics. Quarterly planning with one set of definitions. The cadence made</p>	<p>S SCALE</p> <p>The shared operating dictionary became the foundation for every subsequent initiative — M&A</p>
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HOW A KEYDELTA ENGAGEMENT RUNS



“We thought we were one company. Then we tried to sum three regions' pipeline numbers and realized we had three definitions of 'revenue.' You can't run a global business with a Tower of Babel for metrics.”

— CFO, GLOBAL CLOUD INFRASTRUCTURE PROVIDER

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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>PIPELINE ACCURACY</p> <p>68% → 87%</p> <p>Data-driven visibility replaces guesswork</p>	<p>FORECAST VARIANCE</p> <p>28% → 11%</p> <p>Sandbagging eliminated; discipline installed</p>	<p>SALES PRODUCTIVITY</p> <p>\$450K → \$577K/AE</p> <p>+28% revenue per AE per year</p>	<p>DEAL VELOCITY</p> <p>65d → 45d</p> <p>31% faster deal progression</p>	<p>ANNUAL CHURN</p> <p>12.0% → 8.5%</p> <p>Unified GTM improves retention</p>	<p>AE RETENTION</p> <p>Declining → Stabilized</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>V VISION</p> <p>One GTM engine across acquired entities — consistent playbooks, unified pipeline, single source of truth.</p>	<p>O OUTCOMES</p> <p>Pipeline accuracy and forecast variance became the north star metrics. Every process change tied to reducing variance and improving accuracy.</p>	<p>O OWNERSHIP</p> <p>Sales leader owned forecast; RevOps partner owned data integrity and governance; AEs owned forecast discipline within their territories.</p>	<p>C CADENCE</p> <p>Weekly pipeline reviews surfaced forecast risks early. Monthly accuracy scorecards tied individual AE performance to probability calibration.</p>	<p>S SCALE</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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PROFESSIONAL SERVICES TRANSFORMATION

Five Acquisitions, Five Playbooks, Zero Consistency — And Our Margins Were Eroding

How an operator-CEO unified a fragmented PS org across five acquisitions — doubling win rates, lifting margins 12 points, and building an operating system that scaled without heroes. Unified proposal process deployed by week 8; first win under new system by week 12.

PROFESSIONAL SERVICES

5 ACQUISITIONS

MARGIN RECOVERY

OPERATING SYSTEM

2x

WIN RATE

-40%

TIME TO CLOSE

+12 pts

PS MARGINS

+21 pts

CLIENT NPS

+23 pts

EMPLOYEE ENPS

THE SITUATION

A PE-backed national managed services provider had acquired five companies in two years — MSP, PS firm, nearshore engineering, cybersecurity, and managed services. Revenue grew, but the PS org was running five different playbooks with no integration.

- Five acquired teams, five proposal processes, zero consistency
- Scope creep and rework were the norm — requirements gathering was ad hoc
- Margins eroding: teams underpriced to win deals, then over-delivered
- Win rates well below industry benchmarks; sales cycles dragging
- Top performers leaving — morale dropping as clarity evaporated

THE APPROACH

The initial assumption was a training problem — teams just needed upskilling. The Five Whys revealed the issue was structural: five entities, five processes, zero integration. The CEO brought in B Street Advisors as a specialized PS partner, operating under KeyDelta's VOOCS execution framework:

- 1 Discovery & Baseline**
Diagnostic across all legacy entities. Mapped every process from lead-to-close. Identified heroes, gaps, and competing methodologies.
- 2 Design & Standardize**
Unified proposal process end-to-end: requirements gathering, solution architecture, value-based pricing, and a consistent value proposition.
- 3 Implement & Operate**
New processes deployed, teams retrained, cadence installed (weekly pipeline reviews, monthly PS metrics), ownership defined at every stage.
- 4 Measure & Scale**
KPIs established. Dashboards and accountability rhythms built to survive leadership changes.

THE RESULTS — 12 MONTHS

<p>WIN RATE</p> <p>22% → 45%</p> <p>More than doubled</p>	<p>TIME TO CLOSE</p> <p>68 → 40d</p> <p>40% faster cycle</p>	<p>PS MARGINS</p> <p>24% → 36%</p> <p>+12 pts value pricing</p>	<p>UTILIZATION</p> <p>61% → 78%</p> <p>Reduced bench time</p>	<p>CLIENT NPS</p> <p>31 → 52</p> <p>Consistent delivery</p>	<p>EMPLOYEE ENPS</p> <p>18 → 41</p> <p>Clarity + career paths</p>
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THE VOOCS LENS — BUILDING THE SYSTEM THAT SURVIVED LEADERSHIP CHANGES

<p>V</p> <p>VISION</p> <p>One company, one value proposition — differentiated by engagement, not legacy entity.</p>	<p>O</p> <p>OUTCOMES</p> <p>Measurable KPIs from day one. Every process changed tied to a metric.</p>	<p>O</p> <p>OWNERSHIP</p> <p>Every lifecycle stage got a single owner with decision authority.</p>	<p>C</p> <p>CADENCE</p> <p>Weekly reviews + monthly scorecards. Problems visible before crises.</p>	<p>S</p> <p>SCALE</p> <p>Playbooks and templates. The system worked without any single person.</p>
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“This wasn't a consulting engagement — it was an operating system install. We didn't just improve metrics. We built a PS organization that runs without heroes.”

— CEO, PE-BACKED NATIONAL MANAGED SERVICES PROVIDER

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