

FOR SCALING CEOs &amp; C-SUITE

# Your Strategy Is Right. Your Operating System Isn't.

Four engagements where the strategy was right but the operating mechanism wasn't. Each one: install the decision, forecast, or knowledge system that let growth compound instead of block itself.

## WHY THESE CASES, IN THIS ORDER

Scaling companies hit the same wall: more ideas than the system can close, more initiatives than anyone can prioritize, and a C-suite spending more time in alignment meetings than in the market. These four show the operating fixes that restore velocity without adding bureaucracy, usually inside 90-180 days.

## INSIDE THIS PACKET

### Execution Velocity

*"19 of 23 pilots never scaled"*

Decision cycle 5 months → 72 hours

### Consensus to Closure

*"Flagship 14 months late, no one calling it"*

Shipped in 6 weeks · 3 releases in 6 months

### AI Knowledge Assistant

*"500 employees, tribal knowledge, no system"*

Tickets -68% · 84% first-ask · 4.4x ROI

### GTM / RevOps Transformation

*"Three CRMs, everyone sandbagging the forecast"*

Pipeline accuracy +19pts · velocity +31%

THE KEYDELTA OPERATING MANTRA

**Define it. Measure it. Own it. Close it. Scale it.****Which of these looks most like your situation?**[russ@keydelta.com](mailto:russ@keydelta.com) · [Book a 20-min Diagnostic →](#)

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

EXECUTION VELOCITY & OPERATIONAL DISCIPLINE

# 19 of 23 Successful Pilots Never Scaled — The Pilots Weren't the Problem

How an operator-CEO eliminated five months of decision paralysis and transformed a company where 83% of successful pilots died — installing pre-commitment frameworks that turned analysis into action within 72 hours.

ENTERPRISE TECH PILOT-TO-SCALE EXECUTION SYSTEM PE-RELEVANT

**83%→0%**  
PILOT FAILURE RATE

**5→1mo**  
DECISION CYCLE

**\$180K**  
ANALYSIS WASTE CUT

**3x**  
PILOT-TO-SCALE SPEED

**0→100%**  
PILOT-TO-SCALE RATE

THE SITUATION

A PE-backed managed IT services and cloud infrastructure company (\$65M revenue) had two compounding problems: strategic decisions took five months of analysis paralysis to close, and 19 of 23 successful pilots — an 83% failure rate on initiatives that worked — never scaled to production. \$180K spent on research that never led to action.

- Five-month decision cycle on a mid-market expansion — four rounds of analysis, each round spawning new questions, never reaching closure
- 19 successful pilots sitting in an organizational graveyard — proven value, no path to scale
- Customer success automation reduced tickets 35%, saving \$180K/year — but never rolled out because 'budget approval' stalled indefinitely
- 'Data-driven' culture had become 'data as procrastination' — analysis replaced judgment instead of informing it
- Champions leaving or rotating before scale decisions were made — institutional momentum evaporating with each org change

THE APPROACH

The Five Whys exposed the real gap: no mechanism connecting pilot success to scale commitment. The operator-CEO installed two interlocking systems: a decision-forcing framework that made inaction visible, and a pre-commitment model that eliminated the approval gap between pilot success and scale:

- 1 Expose the Cost of Waiting**  
Made decision delay visible. Every deferred decision got a documented cost: lost revenue, missed market windows, resource waste. 'What's the cost of waiting another week?' became the forcing question.
- 2 Install Decision Closure**  
Established decision deadlines and single owners. Banned 'let's get more data' as a default — required the specific data point that would change the answer. If nobody could name it, the decision closed.
- 3 Pre-Commitment Framework**  
No pilot starts without a signed Pre-Commitment Agreement: executive sponsor, success criteria, scale budget pre-allocated, rollout plan documented. If leadership won't commit to scaling before the pilot, the pilot doesn't run.
- 4 Operationalize the System**  
Weekly Close cadence installed. Pre-commitment agreements became standard. Pilot teams built for scale from day one — involving the rollout teams during the pilot, not after.

THE RESULTS — 6 MONTHS

<p><b>DECISION CYCLE</b> <b>5 mo → 1 mo</b> 80% faster closure</p>	<p><b>PILOT SCALE RATE</b> <b>17% → 100%</b> All approved pilots scaled</p>	<p><b>PILOT WASTE</b> <b>19 dead → 0</b> Pre-commitment eliminated graveyard</p>	<p><b>SCALE SPEED</b> <b>Never → 90 days</b> Pilot to production</p>	<p><b>CUSTOMER DELIVERY VELOCITY</b> <b>Slipping → On-Time</b> Scaling approved pilots accelerated feature delivery customers had been waiting on for quarters</p>	<p><b>CHAMPION RETENTION THROUGH PILOT</b> <b>Rotating Out → Stayed to Scale</b> Pre-commitment gave sponsors confidence their work would ship — champions stopped leaving mid-pilot</p>
----------------------------------------------------------------------------	-------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------	------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

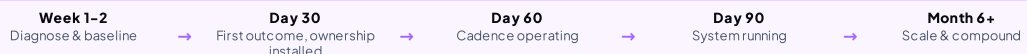
THE VOOC'S LENS — WHY PRE-COMMITMENT UNLOCKED VELOCITY

<p><b>V</b> <b>VISION</b> Become a company that acts on its own intelligence — where proven ideas scale in quarters, not years, and data informs decisions instead of replacing them.</p>	<p><b>O</b> <b>OUTCOMES</b> Every pilot had pre-defined success criteria with numbers and deadlines. Every decision had a documented cost of delay. No initiative survived without a metric attached.</p>	<p><b>O</b> <b>OWNERSHIP</b> Single decision owners replaced committee consensus. Executive sponsors signed pre-commitment agreements — owning the scale decision personally, not</p>	<p><b>C</b> <b>CADENCE</b> Weekly Close forced decisions to a deadline. 'What closed? What's stuck? What's the cost of waiting another week?' — deferrals became more expensive than decisions.</p>	<p><b>S</b> <b>SCALE</b> Pre-commitment agreements became the standard operating procedure. Pilot teams built for production from day one. The system ensured every approved</p>
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Operator-led, not PowerPoint-led. Embedded alongside your team. Outcomes over retainers.

PROPRIETARY & CONFIDENTIAL • KEYDELTA keydelta.com • Define it. Measure it. Own it. Close it. Scale it. ADVISORY

HOW A KEYDELTA ENGAGEMENT RUNS



“We had an 83% failure rate on successful pilots. Not because the pilots failed — because no one had committed to scaling them before they started. Pre-commitment changed everything.”

— COO, PE-BACKED MANAGED SERVICES PLATFORM

Ready to install this operating system at your company?

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

russ@keydelta.com • Book a 20-min Operating Diagnostic →

CONSENSUS TO CLOSURE TRANSFORMATION

# Our Flagship Was 14 Months Late and Nobody Would Make the Call

How an operator-advisor broke the consensus paralysis that had stalled a flagship product 14 months — installing ownership, authority grants, and forcing mechanisms that got the product shipped in 6 weeks. First authority grants issued by day 5.

- VERTICAL SAAS
- \$40M ARR
- EXECUTION CULTURE
- DECISION VELOCITY

**14→6 wk**

SHIP TIME

**3x**

RELEASE VELOCITY

**0→3**

RELEASES IN 6 WEEKS

**40%**

FASTER DECISIONS

**Days**

DECISION CYCLE TIME

THE SITUATION

A \$40M vertical SaaS company in supply chain management, built on a culture of collaboration and consensus had stalled. Their flagship product, Version 2.0, was 14 months behind schedule. Competitors were shipping quarterly. Customers were churning. The culture the founder was most proud of was killing the company.

- Flagship product 14 months behind schedule — 'Project Horizon' debated weekly, never shipped. Competitors releasing features quarterly while they debated scope
- Consensus culture meant every decision required everyone's agreement — meetings ended with 'let's align more' instead of decisions
- Key leaders had built careers on strategic ambiguity — never being the one who decided meant never being the one who was wrong
- Churn creeping up and sales declining as customers lost patience waiting for promised features
- Founder confused harmony with effectiveness — believed keeping everyone comfortable was the same as keeping the company alive

THE APPROACH

The original hypothesis was culture — the team lacked urgency. The Five Whys revealed the real issue: consensus wasn't collaboration — it was avoidance. The fix required making ownership unavoidable:

- 1 Diagnose the Avoidance**  
Sat in leadership meetings for a week. Watched smart people talk past each other for 45 minutes without closing a single decision. Mapped how 'alignment' was being used to avoid accountability.
- 2 Authority Grants**  
Assigned single owners with real decision authority for every critical initiative. The CPO got product decisions. The CRO got territory restructuring. No more consensus — one person decides, everyone executes.
- 3 Install Forcing Mechanisms**  
Weekly Close with four questions: What closed? What's stuck? Who decides by when? What's the cost of waiting? Made deferral more expensive than deciding.
- 4 Let the System Filter**  
Some leaders couldn't handle the loss of ambiguity and self-selected out. More people rose to the occasion than expected. The founder found a new kind of leadership — making the mission clear instead of keeping everyone comfortable.

THE RESULTS — 6 MONTHS

<p><b>HORIZON SHIP</b></p> <p><b>14 mo late → Shipped</b></p> <p>6 weeks after authority grants</p>	<p><b>RELEASE CADENCE</b></p> <p><b>0 in 2 yrs → 3 updates</b></p> <p>More than prior 2 years combined</p>	<p><b>DECISION SPEED</b></p> <p><b>Months → Days</b></p> <p>Authority grants eliminated loops</p>	<p><b>CHURN</b></p> <p><b>Rising → Dropping</b></p> <p>Customers saw product momentum</p>	<p><b>SALES</b></p> <p><b>Declining → Growing</b></p> <p>Stabilized then grew</p>	<p><b>LEADERSHIP</b></p> <p><b>Avoidance → Ownership</b></p> <p>2 self-selected out, rest stepped up</p>
-----------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------

THE VOOC'S LENS — WHY OWNERSHIP BROKE THE LOGJAM

<p><b>V</b></p> <p><b>VISION</b></p> <p>Ship Horizon and prove to customers, employees, and the market that this company can execute — not just discuss.</p>	<p><b>O</b></p> <p><b>OUTCOMES</b></p> <p>Every initiative had a ship date, a metric, and a single owner. No more 'let's align' — either it shipped or it didn't, and the number told the story.</p>	<p><b>O</b></p> <p><b>OWNERSHIP</b></p> <p>Authority grants replaced consensus. The CPO made the analytics call — ship without it, prioritize speed. Decision made in hours, not months. One person, real authority.</p>	<p><b>C</b></p> <p><b>CADENCE</b></p> <p>Weekly Close surfaced what was stuck and who was deferring. The cost of waiting became visible. Thursday became 'pre-close prep' — people resolved blockers before the meeting.</p>	<p><b>S</b></p> <p><b>SCALE</b></p> <p>The authority grant model became the operating norm. New initiatives launched with owners, not committees. The company shipped three updates in the months after Horizon — more than the previous two years.</p>
--------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

HOW A KEYDELTA ENGAGEMENT RUNS

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

Operator-led, not PowerPoint-led. Embedded alongside your team. Outcomes over retainers. PROPRIETARY & CONFIDENTIAL • KEYDELTA ADVISORY keydelta.com • Define it. Measure it. Own it. Close it. Scale it.

Ready to install this operating system at your company? Fixed-scope engagements with milestone gates. Pause or extend at any checkpoint. russ@keydelta.com • Book a 20-min Operating Diagnostic →

AI KNOWLEDGE & EMPLOYEE PRODUCTIVITY

# 500 Employees Asking Each Other Questions That a System Should Answer

Every department had its own documents, wikis, and tribal knowledge — and employees Slacked a colleague every time they needed an answer. KeyDelta built an AI assistant that gave everyone instant access to HR policies, product specs, sales playbooks, and live business intelligence.

<b>-68%</b> INTERNAL TICKETS	<b>&lt;8 sec</b> AVG ANSWER TIME	<b>84%</b> FIRST-ASK RESOLUTION	<b>6</b> DEPARTMENTS SERVED	<b>4.4x</b> ROI IN 6 MONTHS
---------------------------------	-------------------------------------	------------------------------------	--------------------------------	--------------------------------

## THE SITUATION

A mid-market cloud services provider with 500+ employees had a knowledge problem disguised as a people problem. Every department — HR, engineering, product, sales, marketing, finance — had its own documents, wikis, and tribal knowledge. When employees needed answers, they Slacked a colleague, filed an internal ticket, or just guessed. The result: constant interruptions, inconsistent answers, and a growing internal support burden that pulled senior people away from high-value work.

- HR fielding 200+ repetitive policy questions per month — PTO, benefits, expense policies, onboarding steps
- Sales reps couldn't find current product specs or competitive positioning without asking product managers
- New hires took weeks to become self-sufficient — tribal knowledge lived in people's heads, not systems
- Marketing and sales using outdated collateral because the latest versions were buried in shared drives
- Finance and ops leaders navigating Power BI dashboards to answer questions that should take 10 seconds

## THE APPROACH

KeyDelta built a conversational AI assistant that connected to the company's entire content ecosystem and gave every employee a single place to ask anything:

- 1 Content Ingestion & Knowledge Graph**  
Indexed content repositories across HR, product, sales, marketing, engineering, and finance. Built a unified knowledge index that understood relationships between documents, policies, products, and processes.
- 2 Copilot Studio + Power BI Integration**  
Deployed on Microsoft Copilot Studio for natural language chat with deep Microsoft 365 integration. Connected Power BI for real-time business intelligence queries — revenue, service metrics, and operational KPIs accessible through plain English questions.
- 3 AWS Lambda Backend Intelligence**  
Complex queries requiring Python-based ML inference and multi-source synthesis routed to AWS Lambda — leveraging the company's existing AWS infrastructure and ML libraries not available in Azure Functions. Serverless architecture meant costs scaled with usage, no headcount.
- 4 Department-Specific Tuning & Rollout**  
Tuned response accuracy per department. HR got policy-specific citation and compliance guardrails. Sales got competitive intel with freshness dates. Finance got BI answers with drill-down links. Each department validated before launch.

## THE RESULTS — 6 MONTHS

<b>INTERNAL TICKETS</b> 850/mo → 270/mo 68% reduction in internal asks	<b>ANSWER TIME</b> Hours/Days → <8 sec From waiting on people to instant	<b>FIRST-ASK ACCURACY</b> N/A → 84% Resolved without follow-up	<b>EMPLOYEE NPS</b> 32 → 61 Staff love instant, accurate answers	<b>CUSTOMER CSAT</b> 4.0 → 4.4 / 5 Faster staff answers = faster customer answers	<b>COST AVOIDANCE</b> \$0 → \$420K/yr 3.5 FTEs redirected to high-value work
------------------------------------------------------------------------------	--------------------------------------------------------------------------------	----------------------------------------------------------------------	------------------------------------------------------------------------	-----------------------------------------------------------------------------------------	------------------------------------------------------------------------------------

## WHY IT WORKED — THE KEYDELTA VOOC S LENS

<b>V VISION</b> Any employee, any question, answered in seconds — no more Slack-a-colleague culture.	<b>O OUTCOMES</b> Internal ticket volume, answer accuracy, and department time savings measured weekly. The agent had to earn adoption with quality, not mandates.	<b>O OWNERSHIP</b> Each department owned their knowledge source accuracy. IT owned the platform. Nobody owned 'everything' — clear lanes, clear accountability.	<b>C CADENCE</b> Weekly accuracy reviews + monthly content freshness audits. Stale answers flagged automatically — no more outdated policies in circulation.	<b>S SCALE</b> New departments and content sources added without re-architecture. The agent grew from 3 departments at launch to 6 in four months — same platform, same team.
---------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

“We had 500 people constantly interrupting each other for answers that already existed somewhere in our systems. The AI assistant didn't replace anyone — it freed everyone. Employee NPS jumped 29 points. New hires onboarded in 8 days instead of three weeks. We avoided \$420K in headcount by redirecting people from answering repetitive questions to actual high-value work. Our customers noticed too — response times dropped because our people had answers at their fingertips.”

— KEYDELTA ADVISORY

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>
----------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------

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>
-----------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------

**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

Ready to install this operating system at your company?

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

russ@keydelta.com • Book a 20-min Operating Diagnostic →

Operator-led, not PowerPoint-led. Embedded alongside your team. Outcomes over retainers.

PROPRIETARY & CONFIDENTIAL • KEYDELTA ADVISORY | keydelta.com • Define it. Measure it. Own it. Close it. Scale it.