

TOPIC:

Onboarding Dashboard for
Projected Revenue Forecasting

PROBLEM

The client wanted a way to forecast their revenue for upcoming months using an onboarding dashboard. Their existing CRM setup didn't capture certain data points needed for accurate revenue projections.

SOLUTION

To meet this need, we implemented essential fields in the CRM that capture timelines directly related to onboarding. This included introducing a new step in the onboarding process to ensure all necessary data was captured. We then built an analytics dashboard that provides revenue projections for 45, 60, 90, and 120-day intervals, offering a clear financial outlook for future planning.

TRANSFORMATION

The client gained accurate, timeline-based revenue projections, enabling them to make more informed decisions about resource allocation and future planning. This dashboard added precision to their revenue forecasting, helping the client manage their cash flow more effectively.

INDUSTRY:

Subscription-based business with monthly revenue cycles.

ERPUB'S IMPACT:

The customized onboarding dashboard allowed the client to track revenue forecasts based on real-time CRM data, creating a clearer financial roadmap and enhancing confidence in revenue projections.