

Case Study

How Syntrio improves win rate by 27% and uncovers 23% of leaked revenue

Syntrio is a global leader in Governance, Risk, Compliance and Human Resource solutions that help more than 6,000 organizations make the workplace a better place. Their products range from an employee experience platform and reporting hotlines to more than 1,000 e-learning courses.

syntrio

🏢 Industry: Governance, Risk & Compliance

👥 Employees: 100

🗣️ Sales team size: 30

27% improved win rate

23% of revenue recovered from leaks

92% forecast accuracy

40% more time to sell and close

30 people in Syntrio's Sales and Operations teams aim to win high-velocity deals across several markets. Despite their robust technology portfolio, Syntrio struggled to produce an accurate forecast: multiple dashboards and redundant spreadsheets produced unreliable forecasts, causing the team to spend hours on manual Salesforce administering while the key deals were slipping away.

The Sales and Operations teams partnered with FunnelSource to align on efficient forecasting and generate predictable revenue, quarter after quarter, year after year.



Challenges

- The lack of a standardized shared pipeline view prevented Syntrio's team from making timely strategic decisions, allowing deals to slip.
- Numerous dashboards and static spreadsheets led to revenue leak blindspots, putting quarterly and yearly results at risk.
- Unreliable forecasts were fluctuating weekly, leaving the team with inaccurate predictions and unpredictable revenue outcomes.
- Manual data entry and Salesforce administration were taking time away from selling and closing deals.



Goals

- Provide shared pipeline visibility for Sales and Operations teams so they can easily see what deals are moving, stalled, or at risk, and take action.
- Go spreadsheet-free with a unified dashboard collecting and displaying the most important metrics and sales activities side by side, in real-time.
- Eliminate surprises and guarantee predictability with standardized forecasting workflows and consistent sales methodologies.
- Spend more time driving strategic deals instead of spending hours pulling numbers, combining disparate spreadsheets, and entering the right data manually.



Thomas O'Keefe
President & CEO Syntrio



FunnelSource has simplified my weekly pipeline reviews - I can quickly drill into teams or reps to assess the accuracy of their numbers. Their platform is integral to maintaining our growth.

Key Results with FunnelSource

01

Reached 92% forecast accuracy in year one

Syntrio eliminated the guesswork by establishing accurate forecasting that rolled up across teams, product lines, markets and upsells or renewals.

02

Gained 40% more time selling vs administering Salesforce

By automatically improving CRM data quality, FunnelSource prevents manual data entry and gives reps more time to sell and close deals.

03

Uncovered revenue leaks accounting for 23% of total revenue

FunnelSource's centralized way of tracking data allowed Syntrio's managers to inspect where revenue leak is occurring, get ahead of lost deals and achieve revenue precision.

04

Improved win rate by 27% on deals that might have slipped

With custom-tailored KPIs, based on Syntrio's unique business requirements, the Sales and Operations teams identified risks early and increased the win rate on deals that required attention.

Ready to crush your revenue targets?

Sign up for a custom 30-day trial!

Get started