How Calligo Transformed Their Revenue Performance Using AI

Calligo

OBJECTIVES

Calligo struggled with limited visibility into future revenue performance. To achieve their growth targets and enhance their market leadership, they required a comprehensive understanding of financial impacts across all departments.

Calligo's CEO, Julian Box, needed a clear, objective view of business data for himself and the senior leadership team. Planr provided an executive overview with detailed drill-down capabilities, offering instant access to an independent view of the business, eliminating surprises, and enabling deeper insights into decision impacts on sales and revenue.

HOW CALLIGO USES PLANR

Traditionally, CEOs spend considerable time processing data from multiple sources. With Planr, Calligo's leadership now has an objective view of the business impact of their decisions on sales and revenue performance. The senior team can see real-time data across sales, marketing, finance, and resourcing, enabling them to create performance narratives that inform both past and future decisions. Planr is integral to bi-weekly updates with the CFO, CRO, Director of PMO, and during board meetings.

AT A GLANCE

Challenges

- Limited visibility into future revenue performance
- Need for comprehensive financial trajectory insights across departments
- Requirement for strategic decision-making tools

Benefits

1. Achieved 3% revenue increase in 9 weeks
2. Gained 60 minutes of executive time daily
3. Enhanced confidence in future revenue performance (10x increase)
4. Improved revenue assurance with real-time tracking and modeling
5. Enhanced strategic decision-making capabilities
6. Increased operational efficiency across sales and marketing teams

EARLY RESULTS

Increased Revenue

3% rise in revenue through data-driven sales strategy optimization within 9 weeks.

Increased Confidence

10x boost in confidence regarding future revenue performance.

Time Saving

60 mins saved daily due to the efficient financial overview from Planr.

BENEFITS

Revenue Assurance
Planr introduced a Revenue Assurance Number (RAN) that tracks progress against targets. This feature provided the management team with a stronger financial grip and the ability to model scenarios to identify and mitigate growth inhibitors.

Strategic Decision-Making
Planr has become a cornerstone in strategic decision-making, allowing Calligo to understand and plan for the financial impacts of their business strategies effectively.

Pipeline Health for Accurate Revenue Prediction
Enhanced pipeline visibility and health checks allowed for more accurate revenue forecasting, ensuring better preparedness and strategic planning.

Improved Cashflow
Better financial insight and forecasting directly contributed to improved cash flow management.

Increased Capacity & Performance Across Sales and Marketing Teams
With detailed insights from Planr, sales and marketing teams could enhance their performance and focus on high-impact areas, driving overall business growth.

Time-Saving
Planr's comprehensive data and analytics significantly reduced the time spent on data processing and report generation, allowing leadership to focus on strategic initiatives.

> It has been the basis for key improvements in how we plan, model, project, and report for revenue accuracy, forecasting, and assurance. The knock-on effect of these changes is informing our product, customer, and growth strategies.
>
> If we are at risk of missing a revenue target, I know about it. Planr gives me the insights and time to intervene and course correct."

Julian Box
Chief Executive Officer

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