



## Better board meetings with Mosaic

It takes a village to run great board meetings. Learn how Gem supercharged their board meetings by connecting sales and finance to deliver powerful presentations.

**80%**

Reduction in prep time

**60 Hours**

Saved across teams



### About Gem

Managing and nurturing relationships with top talent requires more than a spreadsheet. Gem recognizes recruiting teams deserve more than the piecemeal tools they currently have. They require software—built specifically for recruiters—that can automate tasks, track touchpoints, show pipeline views, and offer analytics for forecasting hires.

Gem is building talent acquisition solutions that reflect their company values—customer-centricity, transparency, speed, and diversity—all while optimizing relationships between recruiters and top talent.

Gem is on a mission to build the operating system to power modern recruiting.

#### Key Pain Points

- Connecting ERP and CRM data
- Manual data manipulation/ visualization
- Lengthy board meeting prep cycles

INDUSTRY

**Recruiting**

EMPLOYEES

**100 - 150**

TECH STACK

**ORACLE** NETSUITE



**RIIIPPLING**

## Painstaking Prep for Board Meetings

Board meetings are a chance to review company performance, measure KPIs and set strategy. They are vital for addressing issues affecting growth and help bring the future of a company to light. In turn, they also require weeks of preparation pulling together and analyzing information from different departments often through lengthy cycles and disconnected data.

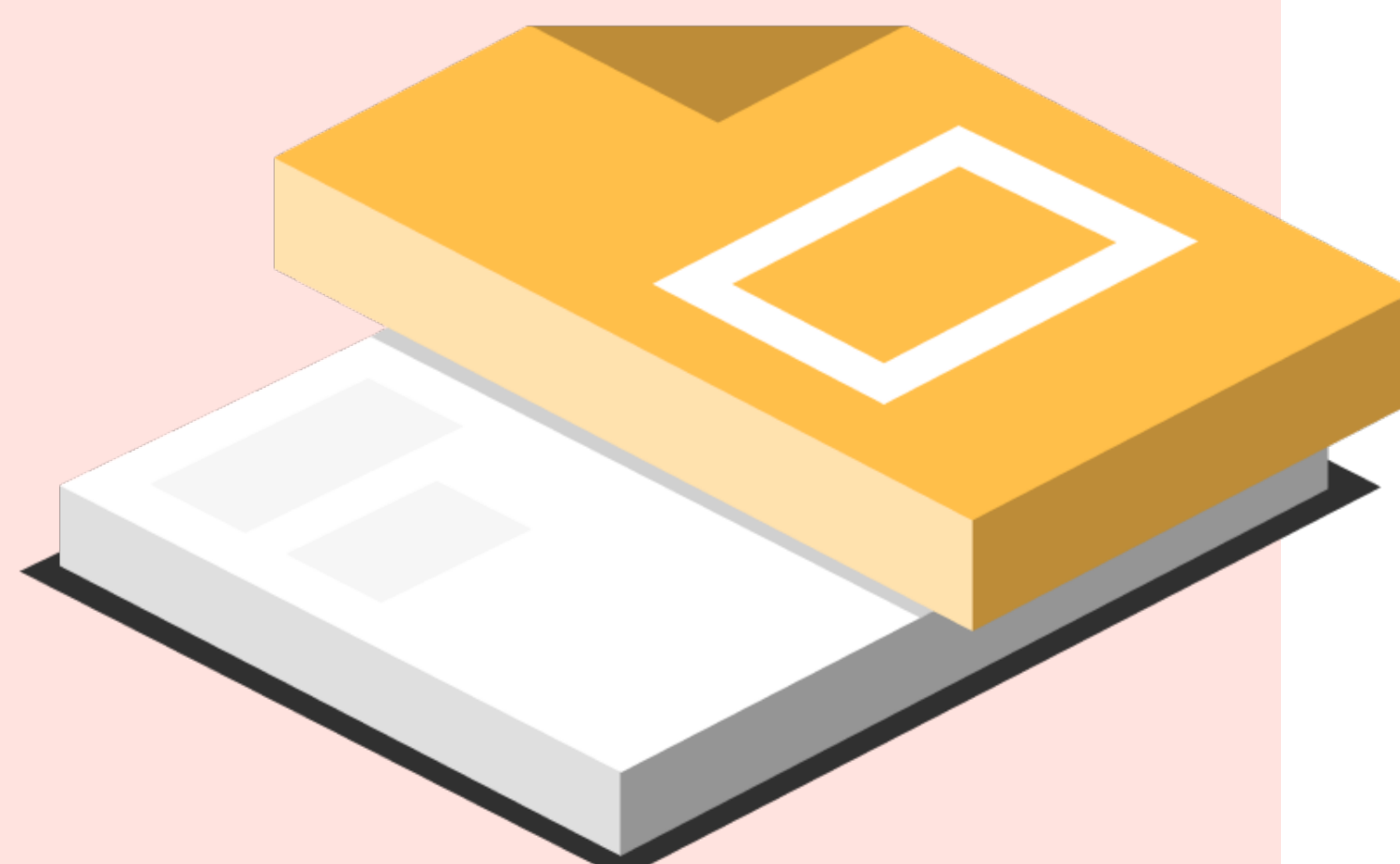
Gem's hypergrowth trajectory meant that sales, finance, and the board needed to be in sync often so the business could continue to scale quickly. The challenge was making sure the effort to keep everyone in sync didn't derail their focus.

Every quarter, Gem's finance and sales org (like so many others) would lock down in a war room for two weeks to prepare their board materials. While critical to their success, this process became a repetitive, time-consuming task, stealing focus and capacity away from forward-looking initiatives to help the business grow.

Gem needed a way to generate faster insights to reduce the time it took to create board materials. They also wanted a way to come out of the board meeting with fewer questions and more on-the-spot answers not possible via spreadsheets, so they could absorb the strategic value of live feedback.

"Our sales pipeline was looking strong but there was no easy way to pull through that information without relying on manual consolidation with multiple rounds of stakeholder revisions. We needed to connect our Sales and Finance teams to become more agile prior to and during important board meetings."

**Susan Phan, VP Finance Gem**



## Connected Tools, Teams, and the Board

The first step in accelerating their board prep planning process was ensuring the data across sales and finance was easily accessible from one central location. With Mosaics' effortless ETL capability, Gem was able to connect their Netsuite and Salesforce data without the pain of data wrangling and copy-paste errors. This shaved off hours of manual work and gave them the ability to access cross-departmental insights with a few clicks, not across tabs and tools.

The second step was automating the GTM analytics the board needed to make decisions, such as retention, new business, and CAC. The finance team was consolidating, analyzing, and cross-checking changes, then designing slides through a painstaking process prior to each session. With the help of Mosaic's analysis canvas—a collaborative, real-time data manipulation and visualization tool—the Gem team was able to automatically generate the insights they wanted to present to the board so they could focus on the story behind the numbers.

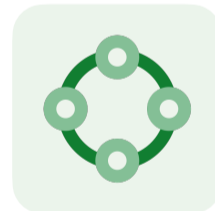
With the above in place, sales and finance could confidently answer on-the-spot questions. Last-minute inquiries (like changes in the Sales pipeline) could be refreshed in real-time and insights could be discussed during the session helping stakeholders make better decisions.

### BENEFITS EXPERIENCED



#### Consolidation

Connecting ERP and CRM systems for faster GTM reporting.



#### Collaboration

Enabled real-time scenario analysis for Sales and Finance to quickly align prior to board meetings.



#### Efficiency

Automated complex calculations and used canvas analysis to provide on-the-spot insights for the board.



## Board Prep In Hours, Not Weeks

"The rate of growth we were experiencing was exciting. The process to scale to match that growth was a challenge. We needed to have fruitful discussions with our board to help calibrate our future plans - Mosaic was able to help us get the foundation in place through better collaboration and a more automated prep process."

**Susan Phan, VP Finance at GEM**

The team was able to connect their sales and finance workflows leading to a stronger and more agile relationship between the two teams. They were also able to reduce the time it took to jointly plan for board meetings by automating much of the consolidation and analysis process so they could dive deeper into the insights.

Gem believes in better tools for talent relationships and acquisition. They now apply the same philosophy to their finances as they do their business - moving beyond manual work and into a world where business tools are there to help accelerate scale.

### Gem is now able to...



View GTM metrics in one place, accelerating sales and finance collaboration.



Expedite the board planning & reporting process to focus on the story.



Report to investors with more accurate and elegant visuals, in real-time.

The best companies are prepared companies.

See how you can run better board meetings.

[Request a Demo](#)