

Revenue

How Revenue.io Transformed Salesforce Data Into Actionable GTM Insights

High-growth companies are always looking for ways to expand their business. Learn how Revenue.io used Mosaic to gain on-demand sales insights to fuel their product line growth.

1 min

Sales Pipeline Snapshot

10 Min

Ad Hoc Sales Reports

32 hrs

Saved on Manual Work



About Revenue.io

Revenue.io powers high-performing teams with real-time guidance. By surfacing and recommending what works best, Revenue.io enables hundreds of customers like HPE, Nutanix, and AWS to deliver predictable results and optimize their entire revenue operation.

Much like the company's focus on accelerating meaningful conversations among sales leaders, the finance team at Revenue.io wanted a system that powered strategic growth conversations based on a rapidly expanding product line.

Key Pain Points

- Tracking complex customer metrics
- Deriving insights from CRM data
- Timely strategic advice for leaders
- Ease of data access and customization by all stakeholders

INDUSTRY

RevOps

EMPLOYEES

100 - 250

TECH STACK

ORACLE NETSUITE

TriNet 

salesforce 

Analyzing a Rapidly Expanding Product Line

It's easier than ever for businesses to diversify their product lines through software as a service (SaaS) subscriptions. The results can be great—but they need to be measured. This is especially true for teams like Revenue.io that have aggressive product expansion strategies.

As Revenue.io expanded from a single-point solution to a platform over the course of two years, they laid out a clear roadmap to optimize new customer acquisition. They onboarded new customers to their primary RingDNA product while methodically cross-selling other emerging product lines. Quickly analyzing new business pipelines while assessing opportunities to attach existing cohorts to other products became increasingly complex.

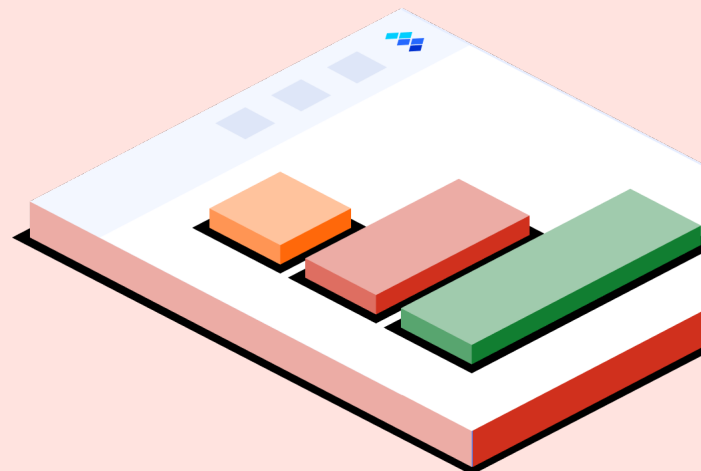
Finance leaders could pull customer and deal information from Salesforce to run the necessary analyses. But, given their SaaS model, it often required up to 12 separate reports just to get a trended view of ARR. Collecting this financial information was too time-consuming, forcing the team to eventually revert to Excel to calculate the 30+ business-critical metrics they needed.

For Revenue.io to fulfill its acquire and expand strategy, it needed a reliable system to do two things: first, centralize Salesforce data for financial analysis. Second, turn all that data into actionable, SaaS-optimized insights for sales and product leaders.



As the number of customers and products grew, we were tasked with finding a way to scale our workflows, analyze new business, and expand revenue against our existing base. This put pressure on finance to find faster ways to deliver insights in support of our vision.”

Kanwar Saluja, COO at Revenue.io



Transforming Salesforce Data into Strategic Insights

Revenue.io needed a dedicated financial analysis tool to replace manual workflows for pulling data from Salesforce and digging into the numbers. They were looking to implement a more flexible platform to help take its product expansion strategy to the next level and they were drawn for Mosaic for two main reasons:

- The ability to seamlessly connect to Salesforce
- The platform's ability to turn static CRM data into actionable, real-time insights for driving strategic decision-making

After implementing Mosaic, the team quickly created 12 powerful self-serve dashboards, saving them **32 hours per month** from manual efforts.

The dashboards now enable them to pull through pipeline metrics to help sales leaders forecast revenue more accurately with deep insight into new customer deal stages, account names, ACV, and renewal bookings. Trended reports help the team better predict the likelihood of net new ARR and carefully manage renewals.

Tracking sales rep productivity was also a critical part of Revenue.io's expansion efforts. The finance team wanted visibility into how quickly sales reps could close deals—specifically for its Moments and Guided Selling products. By connecting Mosaic and Salesforce, Revenue.io was able to benchmark its own sales cycle and test how changes to their own product could improve the products they offered to others.

Finally, to better understand upsell and cross-sell opportunities, the team now relies on a series of pre-loaded metrics that give them visibility into hard-to-come-by cohort data. Being able to easily analyze distinct audiences by product line, attach rates, and customer lifetime value in just a few clicks improves their decision-making, further accelerating their expansion strategy. The finance team can analyze the performance of individual products, understand the most common combinations of products, and effectively engage sales to help grow average customer value.

BENEFITS EXPERIENCED



Sales Pipeline

Trended CRM data available in real-time



SaaS Metrics

On-demand topline, cohort, efficiency, and GTM reports



Strategic Insights

Product portfolio performance including attach rates

Better Product and Sales Planning

Mosaic empowered us to have a more complete view of our product portfolio, turning our existing CRM data into strategic insights for future growth. Sales and finance can now have meaningful discussions around opportunities for expansion and critically by customer segment.”

Kanwar Saluja, COO at Revenue.io

Today’s fast-paced B2B landscape means businesses are connecting more tools than ever before to improve their understanding of customers. By connecting their CRM system to Mosaic, Revenue.io can access real-time customer data in a system designed to give stakeholders a more complete view of trends and potential growth opportunities.

Together, these features allowed Revenue.io to build a financial intelligence layer over Salesforce that helped them automate much of the manual work that was slowing the finance team down —and ultimately empowered leadership to make more strategic decisions about which products to promote and when.

Revenue.io believes in transforming sales teams into a high-performing revenue engine. They now apply the same philosophy to their finances as they do their business—moving beyond manual work into a world where powerful business tools help accelerate scale.

As Revenue.io continues to focus on delivering best-in-class sales software, Mosaic can help uncover deep insights into their most impactful business metrics.

revenue.io is now able to:

- Accurately predict ARR pipeline, cohort retention, and churn
- Drill down into product attach metrics to inform cross-selling strategies
- Run fast, accurate reporting accessible by the entire organization

The Best Companies Are Data-Driven Companies

Learn how Mosaic can help you strategically manage your business.

[Request a Demo](#)