

# Clarity into all aspects of business helps Revenue Automation improve agency operations by 20%

Being at the top, whether you're the CEO, business owner, or the leader of a team, means you wear many hats. When you're the CEO of a services or consultancy based organization this responsibility (at times) feels even more intense – not only are you managing the growth of your business, but you're also responsible for your clients' growth.

## SITUATION

Revenue Automation is known for its exceptional customer service and the keen focus on results. It's this acute focus that has helped Revenue Automation achieve significant results for its clients, such as improving conversion rates by as much as 50%.

It goes without saying, achieving this kind of result requires a true investment in the team and the organization's operational infrastructure. Revenue Automation, like many companies, subscribes to a variety of business tools to help ensure leads are flowing in, projects are getting done, and finances are accounted for.

This presented Revenue Automation with a few challenges 1). Learning how to use the different systems effectively requires significant training 2). Running reports to analyze data is important, but requires the right set-up and more often than not takes time and 3). When you have a report from one system, you have to collate data from a variety of sources to see it in context to your business goals.

## SOLUTION

As with most small-to-medium sized business, Revenue Automation didn't have enough time or resources to constantly update reports and collate data from multiple sources – they also have their day jobs of providing clients with exceptional service and results.

Revenue Automation turned to RESULTS.com to get the big picture of how their company is performing and aligning the details behind project completion, resource allocation, revenue and financial performance to the company's strategic objectives.

Revenue Automation's first step was leveraging the RESULTS.com 1-Page Strategic Plan. Through this tool, the Revenue Automation team defined company goals, milestones and aligned all their business activities to the company's strategy. For the first time the team had access to and understood the company's strategy. This helped the team understand the significance behind activities and why it was important to complete an assigned task.

Upon defining the strategy and company goals, Revenue Automation then leveraged existing integrations and the RESULTS.com API to pull in live data from Salesforce (sales CRM), MavenLink (project management software), and QuickBooks (accounting software). The activities from these systems are used to populate company Key Performance Indicators via a single dashboard. This provides the entire team with visibility into how the company is tracking towards strategic objectives and insight into what needs to happen to keep progress on track.

Centralizing data and activities into RESULTS.com had other benefits as well. Status meetings have become a lot more efficient and streamlined without the hassle of knowing which excel document was updated last and if the data was reflective of what's happening now.



**REVENUE AUTOMATION**  
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Revenue Automation (RA) is a full-service digital marketing agency that is 100% focused on Silverpop email and marketing automation. RA serves business-to-consumer marketing executives by providing full-service data-driven campaign management, integration support, marketing automation, strategy, advanced reporting, and creative design focused on the acquisition, engagement, and retention of your customer base.

For more information visit:  
[revenueautomation.com](http://revenueautomation.com)

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RESULTS.com is a must for CEOs and business owners. It's the best tool I've used to both define and align my team to our company's strategy. My entire team now has a transparent view into our company performance metrics. I also have visibility into team and individual performance. This is powerful because RESULTS.com helps empower and engage everyone to drive the company forward.”

**Peter Steele, CEO – Revenue Automation, Canada**



**20%**

**Improvement  
in operations**