

CASE STUDY

TURNING OPERATIONAL CHAOS INTO A \$1M REVENUE ENGINE

How a Cost Center Became a \$1M Revenue Line

ENGAGEMENT SNAPSHOT

Industry:	SaaS / Technology
Function:	Professional Services
Timeline:	18 Months
Scope:	Department Build - Zero to Scale

59%

Faster Implementation

9.67/10

Avg. Customer Satisfaction Score

\$1M+

New ARR Created

THE SITUATION

This engagement began inside a high-growth software company. There was no onboarding team, no training for new customers, no project timelines, and no consistent definition of success.

Every new customer was handed off from sales into a black box, and outcomes varied wildly depending on who picked it up. Customers were dissatisfied, and leaving in droves.

Every customer that had a negative experience was highly likely to cancel their contract. And the company was experiencing a lingering effect from poor reviews.

This was not only causing customers to leave and affecting more business closing, it was also leaving money on the table for more services to be provided to customers who desperately needed it.

THE CHALLENGE

Onboarding was a cost center, not a business expansion driver.

- Delayed customer projects and timelines
- Low confidence and inconsistent product adoption
- No ability to scale the business without chaos growing with it
- Revenue left on the table by missing structured service options

WHAT WE BUILT

Defined what "done" looks like

Created the first formal definition of customer go-live giving the team a shared target and clients a clear finish line.

Built the team from scratch

Hired and structured an implementation team, solution architects, and support each with defined roles, handoffs, and accountability.

Standardized every engagement

Developed repeatable workflows, project timelines, and training programs so we had a consistent customer experience.

Turned onboarding into a revenue stream

Created tiered service packages that converted a cost center into over \$1M in annual recurring revenue.

Led the most complex accounts personally

Managed enterprise-level implementations while building the infrastructure to scale without owner dependency.

THE OUTCOME

Within 18 months, the company had a fully operational professional services department: structured, staffed, and generating revenue.

Customers went live faster, with more confidence, and stayed longer. What had been a drag on the business became one of its most predictable revenue lines with 59% faster implementations, a 9.67/10 average customer satisfaction score, and over \$1M in recurring revenue added.

The same problems that created chaos here have the potential to exist inside almost every small business: no standard process, no clear definition of "done", an owner handling everything, and quality that depends on who shows up that day.

DOES MY BUSINESS HAVE TRACTION?

- Burn out and encountering the same problems repeatedly
- Hitting a revenue ceiling and feeling unaccomplished
- Unsatisfying meetings and feeling like you are not on the same page as your team
- Disappointing employee performance and things falling through the cracks

HOW TO GET TRACTION

Focus and strengthen the Six Key Components of your organization to gain back freedom:

Vision & Goals

Is it clear what your business is trying to accomplish?

Data & Scorecards

Do you have a measurable scorecard to tell if you are winning or losing?

Process & Documentation

Do you have processes documented and followed by everyone?

Meeting Rhythm & Traction

Do you have effective meetings with clear ownership and action items?

Issue Resolution

Do you have a clear way of defining and resolving issues? Or do they tend to repeat?

People & Accountability

Do you have the right people in the right seat?

Build the system. Define the standard. Remove the bottleneck. Make it run without you. We can help.

BOOK A CLARITY SESSION