

Synergy Snapshot

Org: 639595a0-758a-4af7-9a97-f7ed4420797f
Period: 2025-01-01 to 2025-03-31
Generated: 2025-10-20T22:06:56.918398+00:00

Executive Summary

Synergy Score (Finance): 75
Revenue: £0 GM%: None EBITDA: £None
Customer Lens: Shared 0, Cross-sell 1 (£12000)

Vendors

Open savings opportunities: 1 Est. Savings: £2700

Top Cross-Sell Opportunities

Cross-sell Alpha • £12000 • CO1

Top Vendor Savings

Vendors	Companies	Est £/yr
Demo SaaS	CO1	2700

30-Day Action Plan

Generated on 20 Oct 2025 • Top open items grouped by owner

Total Est. Impact: £0.00

Unassigned

Total: £0.00

Title	Due	Est £/yr	Status	Ref
Evaluate new vendor options • vendor	25 Jan 2025	—	Open	—
Process improvement initiative • ops	01 May 2025	—	Open	—

owner_1_1760997989@example.com

Total: £0.00

Title	Due	Est £/yr	Status	Ref
Cross-sell premium service to top client • cross-sell	30 Jan 2025	—	Open	—
Upsell analytics package • cross-sell	28 Feb 2025	—	Open	—
Introduce add-on services • cross-sell	15 Mar 2025	—	Open	—

owner_2_1760997990@example.com

Total: £0.00

Title	Due	Est £/yr	Status	Ref
Automate manual reporting • ops	10 Feb 2025	—	Open	—
Optimize cloud infrastructure costs • ops	—	—	Open	—

owner_0_1760997987@example.com

Total: £0.00

Title	Due	Est £/yr	Status	Ref
Negotiate better rates with primary vendor • vendor	15 Feb 2025	—	Open	—
Renegotiate software licensing • vendor	01 Mar 2025	—	Open	—
Review office supply contracts • vendor	15 Apr 2025	—	Open	—

• Estimates shown are annualized and indicative.
• Items sourced from Vendor Savings, Cross-sell Opportunities, and Manual entries.
Action Plan items reflect current savings assumptions.
Assumptions: Volume 8%, SaaS 15%, Tail threshold £300.