SaaS & Financial KPIs Enhancement

Cloud-based trucking and logistics solutions

Developed a **comprehensive business reporting** suite that monitors **financial and SaaS KPIs**, providing **automated and expedited insights** to executive stakeholders, enhancing operational reviews and decision-making processes

SaaS company needs a "clear view" into business performance

KPI ENHANCEMENT

Picture this…

You're a trusted industry leader in mobile, telematics, and business process automation solutions for the transportation industry in North America; and looking for streamlining processes and improve visibility into business performance for executive stakeholders while automating the monthly reporting package

You turn to Accordion.

We partner with your team to create a detailed current state management reporting suite with robust KPIs, designed to enable meaningful operational reviews across all acquired subsidiaries and entities, including:

1) Developing a **comprehensive KPI metrics matrix** to provide the leadership team with **clear insights** into business performance, **identify gaps, and guide strategic focus**. The matrix covers key areas such as Financial Health, Customer Success, Sales Performance, and Operational Efficiency, enabling data-driven decisions and targeted actions for growth

2) Conducted an **in-depth assessment of existing data systems** (NetSuite, Salesforce, AS400, QuickBooks, Flat files) and their reporting integrations, **identifying inconsistencies and data mapping gaps**. Also, developed a **strategic phased roadmap** to enhance data accuracy, streamline reporting, and optimize decision-making processes.

3) Developing automated Power BI dashboards featuring KPIs to provide actionable insights for monitoring and driving performance

Your value is enhanced.

You have provided executive stakeholders with a **unified source of truth**, enabling them to thoroughly explore business performance, key drivers, and trends, thus facilitating **targeted analysis and interventions**. You have enabled **quicker and automated access** to key SaaS metrics and financials through interactive visualizations, enhancing operational review through automated dashboards saving ~25 FTE hours per month.

KEY RESULT

- Business reporting suite to track 100+ financial and SaaS KPIs
- Automated monthly reporting pack
- Savings of ~25 person-hours per month

VALUE LEVERS PULLED

- Performance tracking
- BI reporting
- Data sources assessment

ACCORDION

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Approach for finalizing the KPIs and developing an interactive reporting suite

Aligned key stakeholders on defining and standardizing key metrics

- **KPI Prioritization:** Identified crucial KPIs for business performance
- **Metrics Documentation:** Detailed definitions, dimensions, data availability, ownership, and implementation challenges
- **Future KPI Visibility:** Provided comprehensive insight into future state KPIs, data availability, feasibility, and implementation effort

Detailed view of current state data sources and reporting

- **Data Systems Assessment:** Reviewed current state data systems (Netsuite, Salesforce, AS400) and their connections to reporting and Power BI dashboards
- **Identified Data Gaps:** Pinpointed inconsistencies and gaps in data and mappings, differentiating between current and future states.
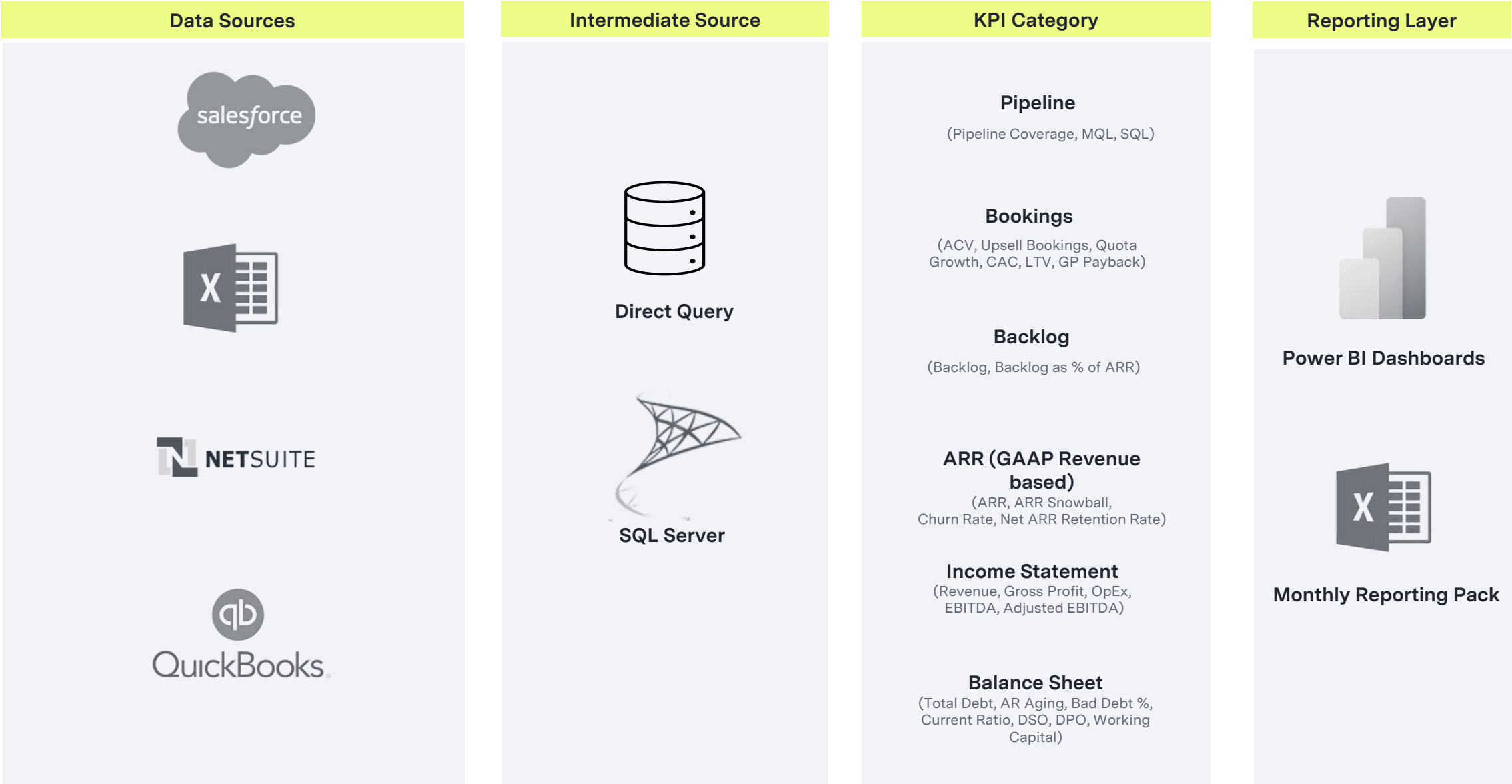
Automated Power BI dashboards

- **Dashboard Wireframes:** Collaborated with stakeholders to design and finalize Executive/Finance dashboard wireframes.
- Developed dashboards for actionable insights to monitor and drive performance
- **Data Integration:** Connected dashboards to source systems and Excel files for semi-automated data refreshes
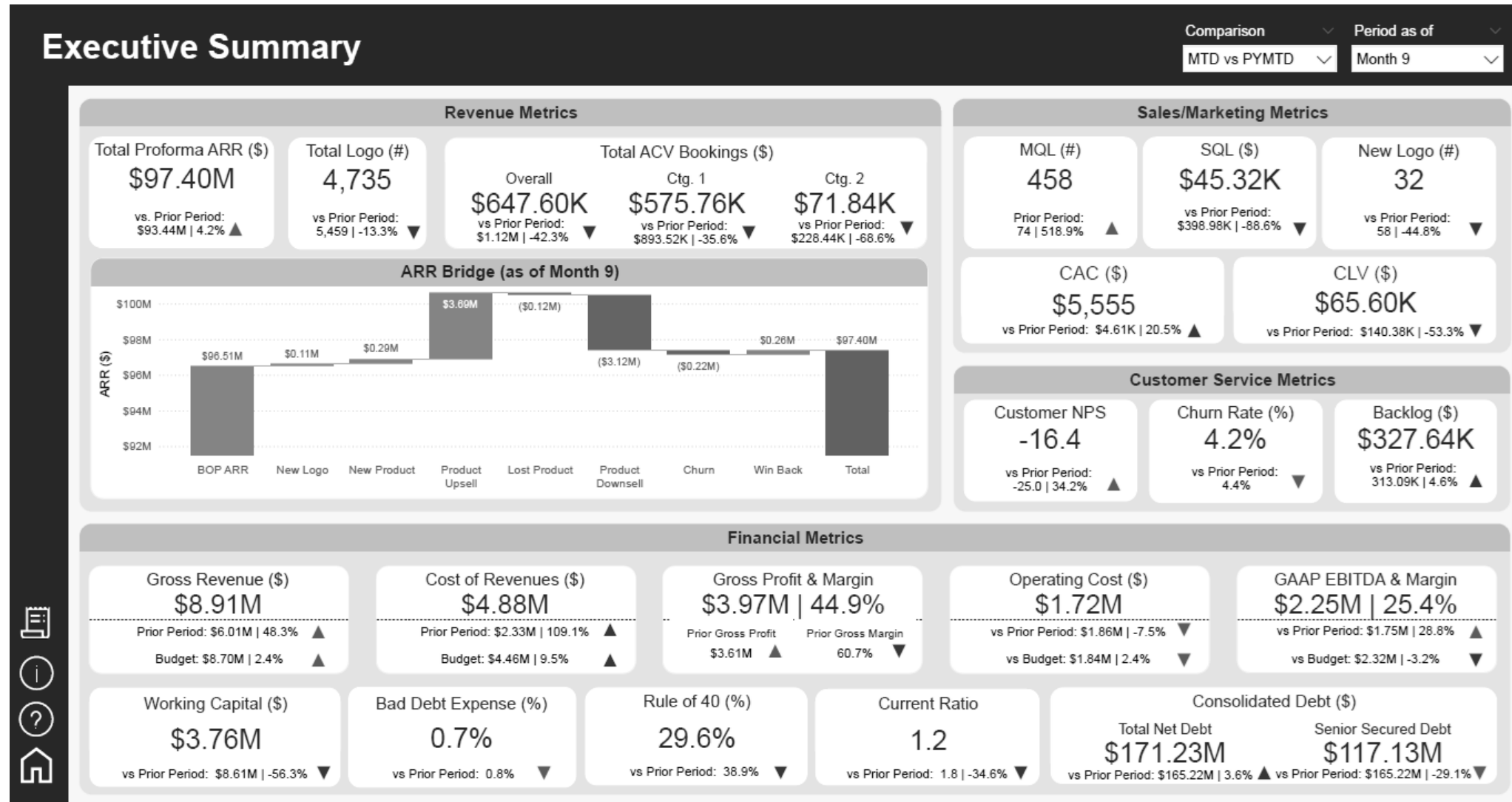
Roadmap to address data gaps and documentation for Dashboard Transition

- **Roadmap –** Developed a detailed phased roadmap to address data gaps and establish a unified source of truth
- **Detailed Guide:** Created step-by-step instructions for maintaining Power BI dashboards, including definitions and calculation methodologies.
- **Recorded Walkthroughs:** Conducted live walkthrough meetings providing recorded details for future reference.
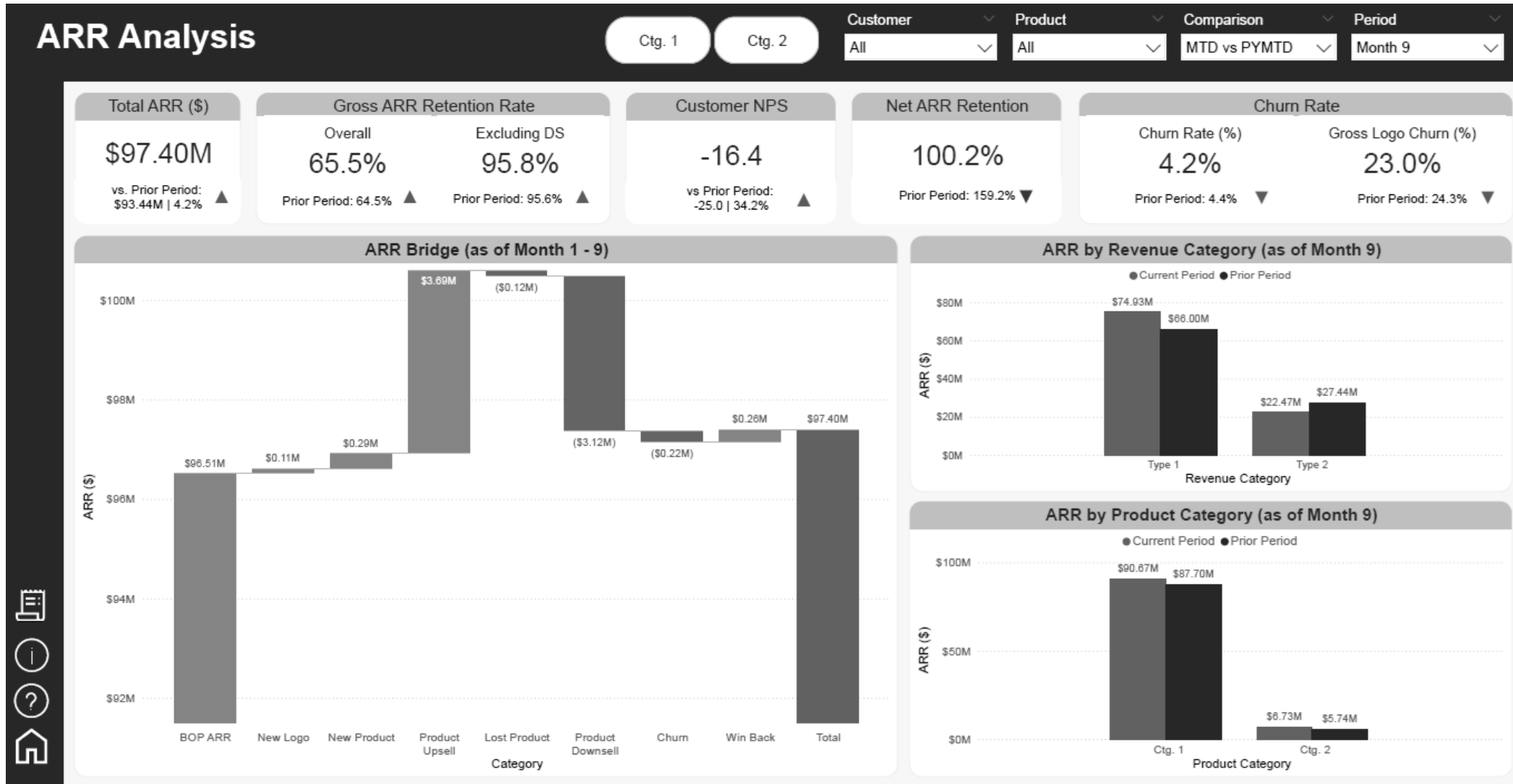
Assessment of the current state and final reporting architecture

Data Sources	Intermediate Source	KPI Category	Reporting Layer

Data Sources
- salesforce
- Excel
- NETSUITE
- QuickBooks

Intermediate Source

Direct Query

SQL Server

KPI Category

Pipeline

(Pipeline Coverage, MQL, SQL)

Bookings

(ACV, Upsell Bookings, Quota Growth, CAC, LTV, GP Payback)

Backlog

(Backlog, Backlog as % of ARR)

ARR (GAAP Revenue based)
(ARR, ARR Snowball, Churn Rate, Net ARR Retention Rate)

Income Statement
(Revenue, Gross Profit, OpEx, EBITDA, Adjusted EBITDA)

Balance Sheet
(Total Debt, AR Aging, Bad Debt %, Current Ratio, DSO, DPO, Working Capital)

Reporting Layer

Power BI Dashboards

Monthly Reporting Pack

ILLUSTRATIVE

Sample snapshots of automated Power BI dashboards developed (3/4)