



# The Revenue Intelligence Platform for Executive Teams

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# The Challenge for Leadership

Your GTM team is Flying Blind – and so are you.

- CRM data is messy and inconsistent across groups and divisions
- Pipeline visibility varies from team to team
- Forecasts are fragile and often over-optimistic
- No consistent view of pipeline health across the company
- You want confidence, clarity, and results – fast

**The pressure is real.**

You want to drive predictable growth and you want to lead with confidence – not gut feel.

**You don't need more toys. You need *Revenue Assurance*.**

We give the C-Suite instant visibility into: what's working, what's broken, and where to act – without the 3-month setup.

**Plug in. Get answers. Take control of Revenue Performance.**

# The Fog of Data

Disconnection Hides Revenue Growth.

**Data Silos:** Disconnected CRM, finance, and marketing tools don't talk to each other – creating blind spots and broken visibility.

**Blind Spots:** You miss critical inefficiencies and hidden risks that directly impact pipeline health, rep performance, and forecast accuracy.

**Revenue Leakage:** Opportunities slip through the cracks. Performance gaps go unspotted. The cost? Millions lost across your portfolio.



**Without clarity, every decision feels like a shot in the dark.**

# Company Leaders Are Flying Blind

The True Cost of Disconnected Data

**82%**

of companies are making decisions based on stale information.

McKinsey

**85%**

of executives state stale data is leading to incorrect decisions and lost revenue.

Dimensional Research

**\$12.9m**

average annual cost to organizations due to poor data quality.

Gartner

**Blind spots don't just slow you down – they cost you millions in lost revenue.**



# The Frankenstack vs RevOper

## Third-Party Solutions

CRM, Finance, and HR data live in silos that require manual stitching or ETL tools like Fivetran, Stitch etc.



A separate data warehouse required. Often Snowflake, Redshift, or BigQuery.



Separate dashboarding tools required. Power BI, Tableau, Looker – all sold separately



No pre-built insights. Must manually build dashboards, KPIs, and models from scratch. All backward looking.



Specialized RevOps or data engineers required. Ongoing cost, slow time to value



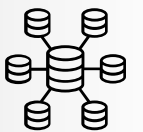
Vs.



Direct API integrations to CRM, Finance, and HR systems. No ETL tools or custom connectors needed



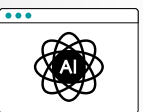
Built-in data warehouse automatically stores and unifies all revenue-critical data



Integrated dashboarding & visualizations. No need for Tableau, Power BI, or Looker



1000s of pre-built KPIs, dashboards, & reports. Powered by AI for forward-looking performance and forecasting



No specialized resources needed  
Live within hours with minimal ongoing support



# Turn Data Chaos Into Competitive Advantage

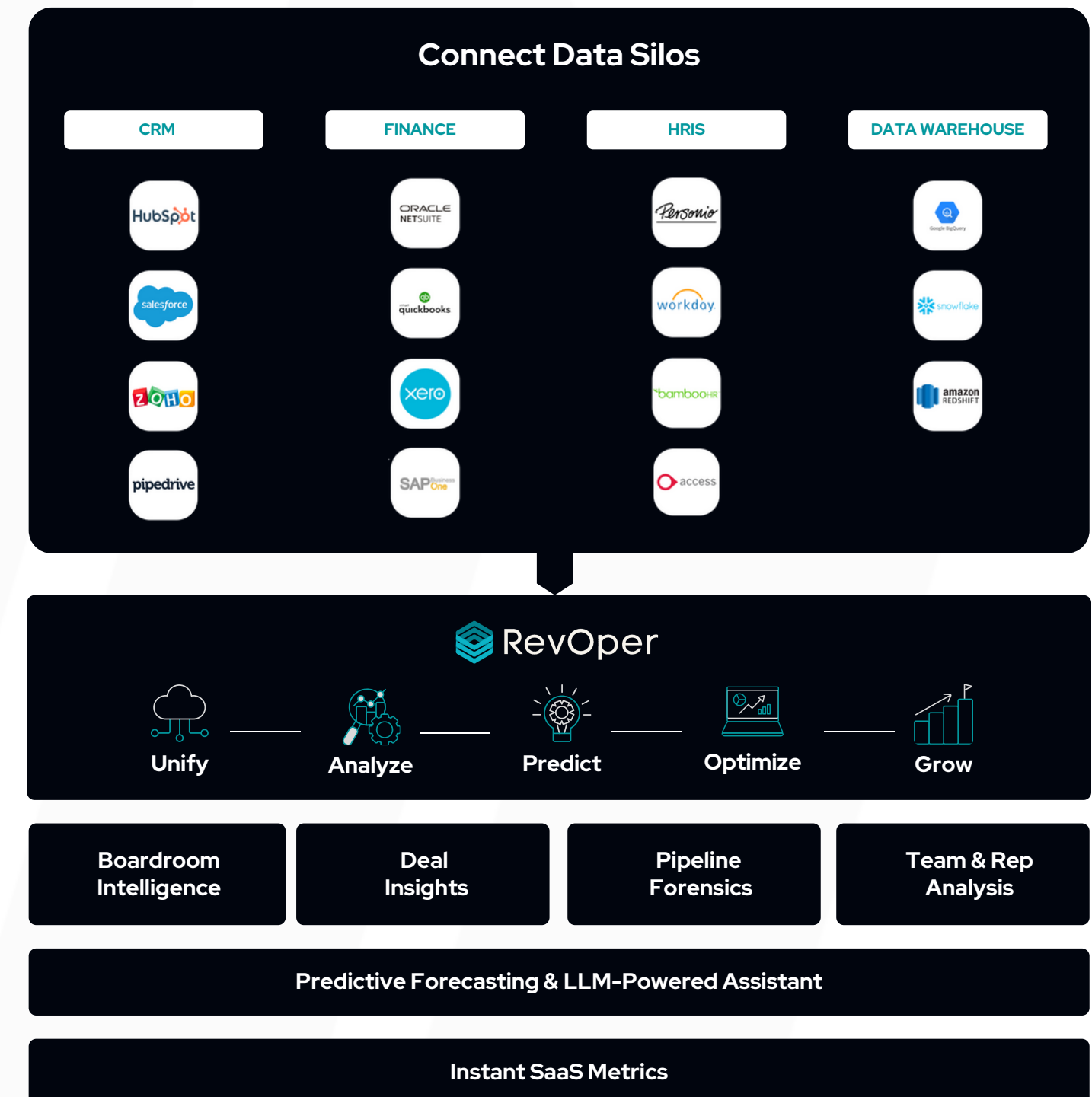
RevOper is the only AI-powered revenue intelligence platform that connects directly to your GTM & Operational systems.

## What We Do

Use real-time data centralization, automated mapping, and AI to create an objective single source of truth for your company. Accessible, actionable, and always up to date – for board members and the C-suite.

## Why We Do It

To bring clarity to company health – so management teams can accelerate growth, sharpen value creation, and deliver bigger exits.





# RAN™: Revenue Assurance Number

A single index that shows how likely your GTM team is to hit its forecast – built from real-time operational and performance data.

## Powered by Core Metrics:

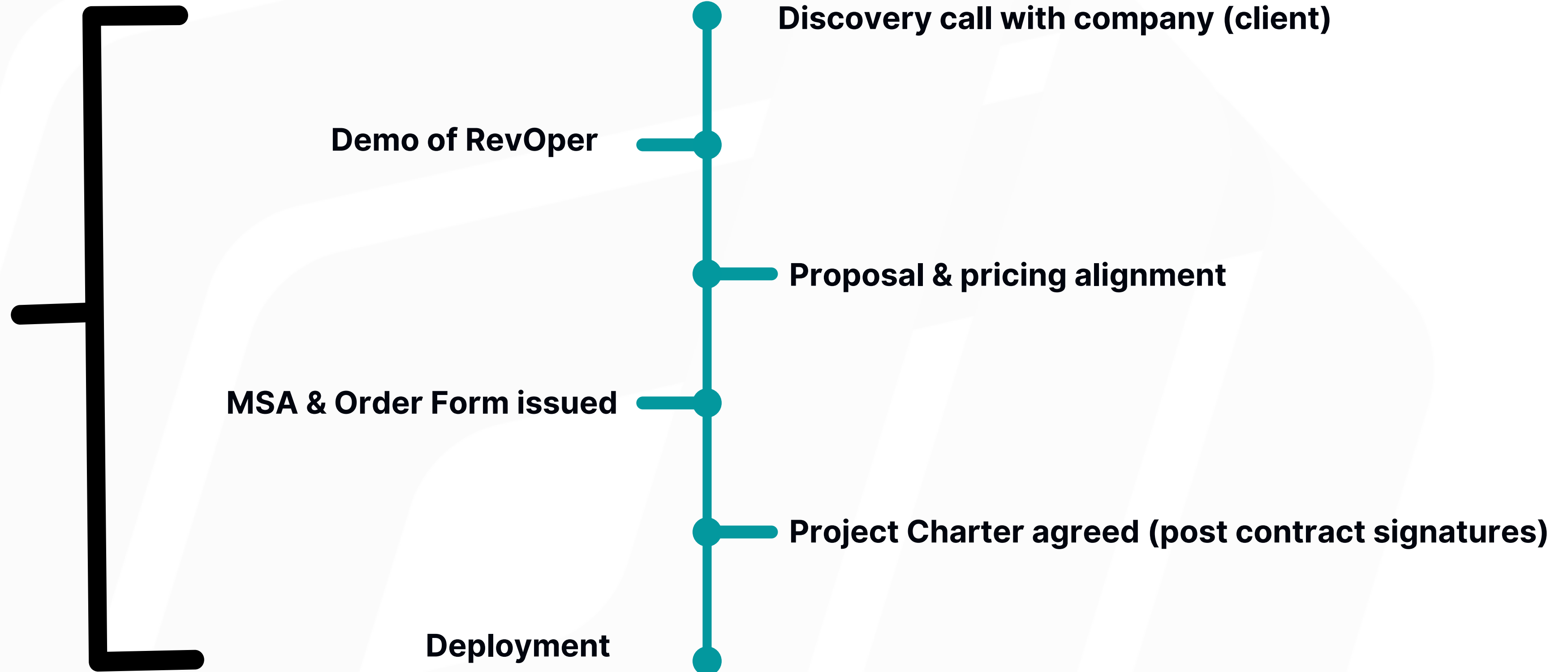
Forecast Accuracy  
Pipeline Coverage  
Conversion Rates  
Rep Productivity  
Pushed Deals  
Time in Stage  
Win/Loss & Velocity Analysis

**Scoring Scale:** 0 – 4 (Low) 5 –7 (Medium) 8–9 (High)

**"It's the credit score for your GTM motion."**

# RevOper Sales Enablement

3 Weeks





# RAN™

## Phase 1

Where are the leaks?

**Pipeline Health:** Coverage vs target, deal quality, funnel gaps

**Conversion Rates:** Stage-by-stage drop-off, rep-level %, bottlenecks

**Rep Productivity:** Bookings per rep, activity-to-revenue ratio

**Run a 2-week RAN Diagnostic.**

**Uncover the hidden truth in your GTM motion.**

# RAN™

## Phase 2

**Are we improving?**

**Push Deal Patterns:** Push rate by rep, stage, product

**Forecast Accuracy:** Commit vs actual, bias and sandbagging

**Time in Stage:** Velocity blockers, revenue-class analysis

**Win/Loss Velocity:** Speed and efficiency of outcomes

**Rep Behavior Trends:** Discipline, CRM hygiene, follow-through

**Seamlessly run monthly Revenue Health Checks.**

**Support leadership and align execution with strategy.**



# RAN™

## Phase 3

**Is this scalable and repeatable?**

**Governance Cadence:** Monthly dashboards, check-ins, accountability

**Playbook Execution:** GTM experiments, onboarding, pricing strategy

**Revenue-Class Performance:** Enterprise vs SMB vs PLG analysis

**Pricing & Payment Leverage:** Time to cash, discounts, upsell motion

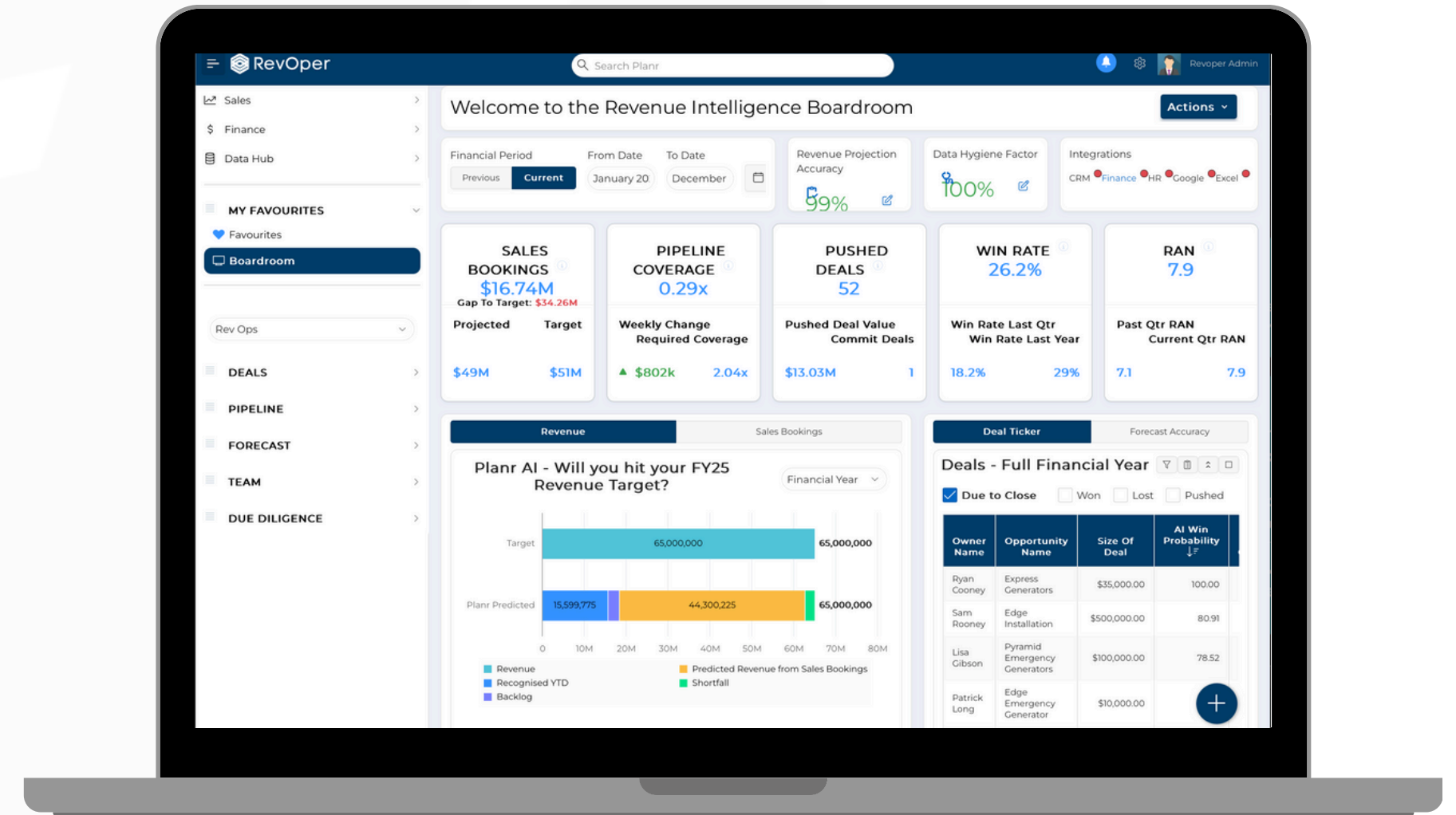
**Exit Readiness Metrics:** Aligned to investor-grade value drivers

**A Revenue Assurance Layer Across Your Portfolio.**

**You stay embedded. Management stay confident.**

# Why Operating Teams Win with RAN™

- ✓ Easily deployed across multiple companies/divisions with minimal lift
- ✓ Continuous insights drive ongoing performance improvement
- ✓ Real-time data accelerates senior decision-making
- ✓ Back every boardroom or management move with hard data



Most sales orgs operate with 45–55% forecast accuracy. With RevOper, operators have **90–96% accuracy across portfolios—turning gut feel into science.**



# Tools, Not Toys

## Why Operating Partners Choose RevOper

- ✓ **Instant Deployment:** Salable, tech-powered value creation at speed and low-lift.
- ✓ **AI-Driven Insights:** While other companies look in the rear-view you can add a powerful AI-powered view of the future.
- ✓ **Ongoing Visibility, Not Just One-Offs:** Use RevOper as the foundation for QBRs, value creation sprints, and revenue growth programs - staying lean and delivering value from day 1.
- ✓ **Custom to Your Playbook:** Incorporate your benchmarks, analysis styles, & value creation frameworks.
- ✓ **System Agnostic:** Work across messy CRM setups, fragmented data, and siloed systems. No more heavy lifting for your team.
- ✓ **Secure, Flexible & Scalable:** Enterprise-grade. Trusted by teams fighting complex data problems.
- ✓ **No Guesswork:** Replace hunches with real-time answers to what's working, what's broken, and where to intervene.



# Background

Our founders bring deep SaaS and operational expertise from their time leading CoreHR—a payroll and HR SaaS business generating over \$50M in revenue and serving global giants like PepsiCo, Amgen, and Pfizer. At CoreHR, Sean Murphy (CEO), Owen Pagan (CRO), and David Welch (CTO) built a legacy of driving operational excellence and scalable growth. Following the successful sale of CoreHR to JMI Equity in 2016, the team remained directors while also leveraging their hands-on experience to further invest in innovative tech companies.

During this period, the first version of what would become Planr was conceived within TDS, an agile enterprise SaaS platform for access control and visitor management. As they worked with multiple portfolio companies, our founders recognized a critical gap: a need for a closed-loop, enterprise-grade AI platform that could provide real-time, actionable insights to drive value creation across the investment lifecycle.

Planr was born as an internal tool to help new investors gain immediate clarity on bookings and revenue performance—proving so effective that it fueled a 3.5x revenue increase over three years, all while remaining fully bootstrapped.

Following further R&D and a renewed focus on the challenges faced by private equity firms and portfolio companies, Planr was officially launched in 2020. Today, Planr embodies our founders' relentless drive to equip investors with powerful insights that fuel growth, streamline operations, and unlock maximum enterprise value.



# Leadership Team



**Owen Pagan**  
**CEO & Co-Founder**

Former CRO, Owen has helped scale high-growth SaaS companies, including CoreHR and TDS. As an Operating Partner and investor, he works closely with PE funds to drive commercial strategy and portfolio value creation.



**David Welch**  
**CTO & Co-Founder**

David is a seasoned SaaS technology leader who leads the product and engineering teams at RevOper and Planr, building scalable data infrastructure and AI tools that power real-time insights and decision-making.



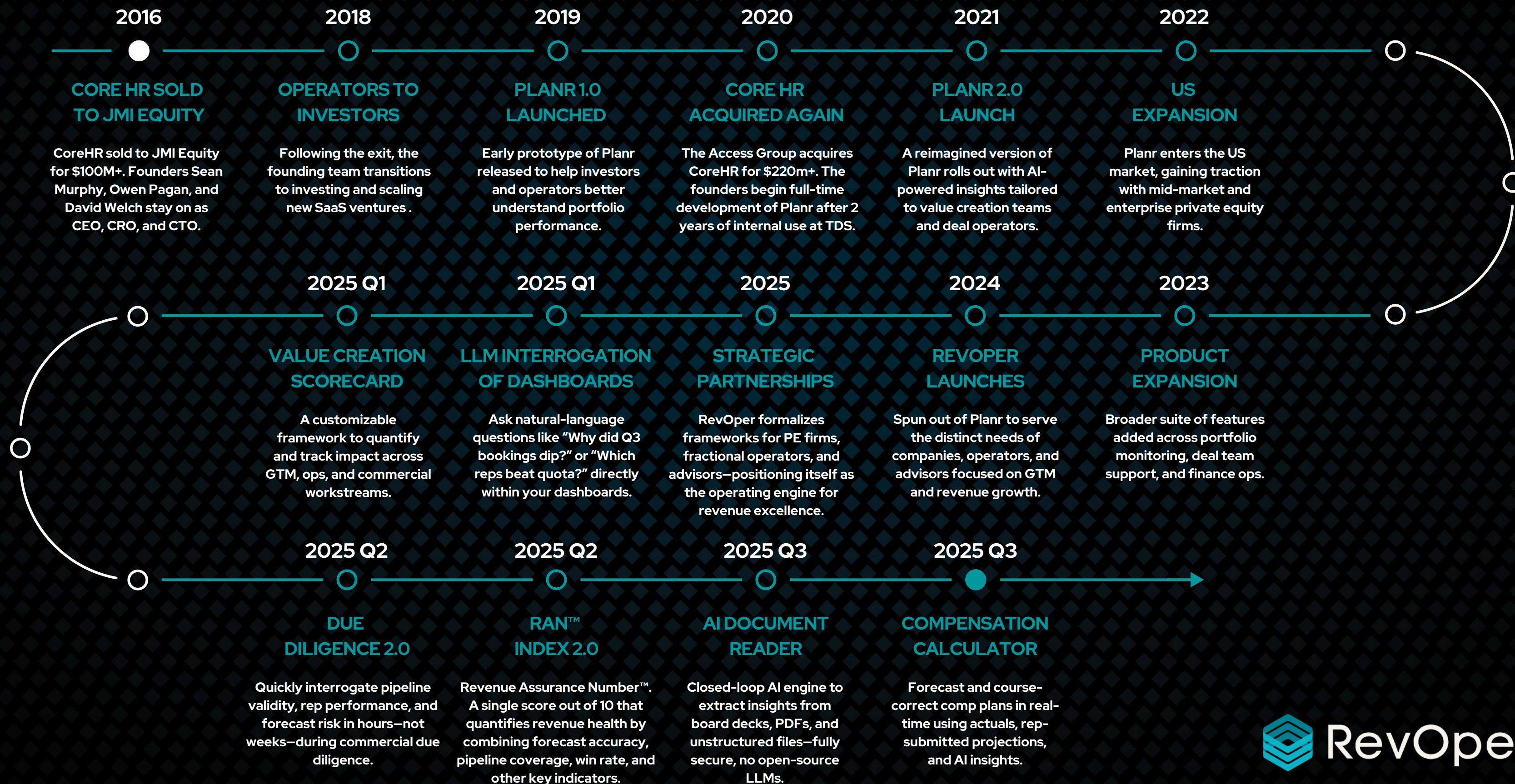
**Sean Murphy**  
**COO & Co-Founder**

Former CEO, Sean has helped guide and scale multiple SaaS companies, including CoreHR and TDS. As an experienced investor, he has worked alongside PE funds as both a board member and co-investor.





# Our Journey & What's Ahead





# Use Cases

## Commercial Due Diligence

Run rapid GTM diligence –quickly identify red flags in pipeline, forecasting, and rep performance.

## Conversion Rate Diagnostics

Diagnose where deals stall and why—down to stage, vertical, or rep – then run experiments to improve flow.

## 100 Day Action Plan

Build, model, and track 100-day commercial value creation plans with real-time feedback loops.

## Boardroom Intelligence

Auto-generate board-ready decks on revenue health, GTM execution, & where the company is trending.

## Sales Capacity Planning

Model rep productivity, territory coverage, and future headcount needs based on trends.

## Post-Merger Integration

Unify disparate sales data and align on a single version of truth across merged entities



# Use Cases

## RAN Tracking

Track RAN scores across your portcos to spot top performers and early risk signals.

## KPI Alignment Across Portcos

Standardize metrics across portfolio companies for benchmarking and portfolio reviews.

## Fund-Level Value Creation Tracking

Track value creation efforts across portcos and see what's really working.

## Boardroom Intelligence

Auto-generate board-ready decks on portfolio health, value creation, & where the portfolio is trending.

## Instant Roll-Up Reporting

Roll up data across funds with different structures to give leadership and LPs a unified view.

## Unified View for Ops

Give ops teams one view across finance, GTM, and performance—tailored to what matters most.



# Use Cases

## Rep & Team Reviews

Benchmark reps and regions using AI-powered attainment, velocity, and win rate comparisons.

## Exit Readiness Planning

Exit Readiness Monitoring: Surface and track revenue metrics that tie directly to enterprise value

## Forecast Audits

Pinpoint unreliable pipeline, highlight sandbagging or over-optimism, & generate unbiased forecasts.

## Pipeline Health Reviews

Track stage velocity, pipeline coverage, and identify aging risk

As part of our partnership, RevOper will support co-developing tools, and features tailored specifically to your methodologies and workflows. Whether it's embedding elements of your playbook or creating repeatable templates for diligence, 100-day plans, or board reviews, we're committed to helping your fund deliver value faster and more consistently across portfolio value creation.

# Competitive Landscape

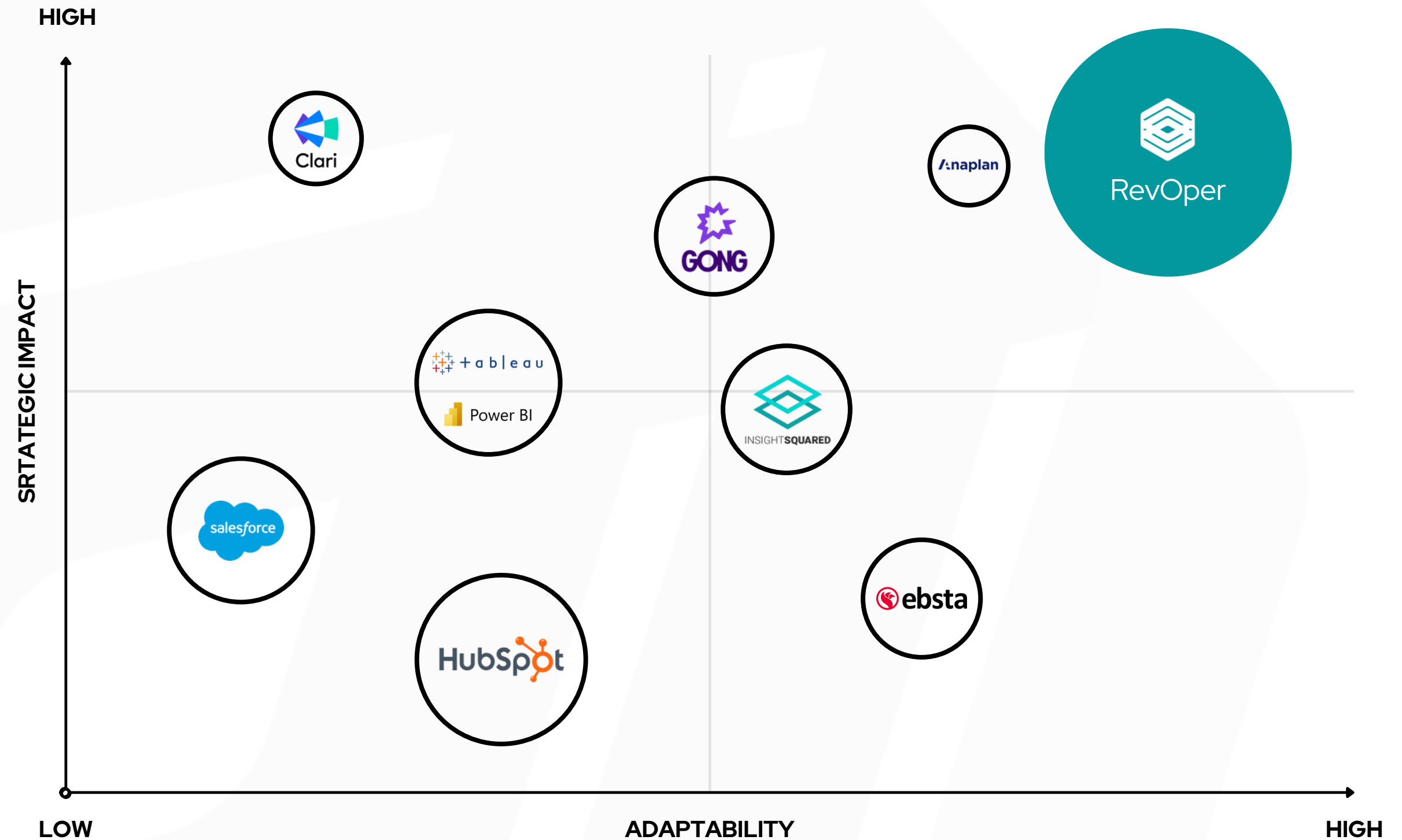
**Most platforms that claim to solve the data problem fall short:**

1. Rigid and slow to set up (Salesforce, Tableau)
2. Fast but tactical-only (Gong, Ebsta)
3. Strategic, but heavy and complex (Clari, Anaplan)

**RevOper is different.**

- Strategic insight.
- Instant deployment.
- Built for flexibility.
- No IT projects.
- No waiting.

Just clarity and action — from day one.



**BUBBLE SIZE = SPEED TO VALUE**

Time from implementation to insight. Larger = faster



# Some of Our Clients

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*Capital Partners*





**Thank you.**

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