

Case Study: How a SaaS Platform Built Revenue Intelligence Using Unified Business Analytics

About the Client

A global **B2B SaaS** platform offering digital experimentation and optimization solutions to enterprises relied on **subscription-based revenue** generated through **new sales, renewals, upgrades, and partner channels**.

As the company expanded across multiple regions and industries, revenue data was generated across multiple operational systems including **sales platforms, contract management systems, customer success tools, and product subscriptions**.

Leadership needed deeper visibility into revenue growth drivers, customer retention trends, contract performance, and product-level contribution to recurring revenue.

However, revenue analytics was **fragmented** across multiple **systems and reports**, making it **difficult to track growth drivers** and understand how different parts of the business contributed to overall **revenue performance**.

The company required a **centralized revenue intelligence framework** to unify **business data** and enable leadership to **monitor growth, retention, and expansion opportunities more effectively**.

The Challenge

Despite strong enterprise demand for its products, the company faced several challenges in understanding revenue performance and operational efficiency.

- **Fragmented Revenue Data Across Systems** : Revenue data across subscriptions, contracts, bookings, and customer accounts existed in multiple operational systems. This fragmentation made it difficult to create a unified view of revenue performance and customer lifecycle metrics.
- **Limited Visibility into Revenue Drivers** : Leadership lacked consolidated insights into how different revenue streams including new business, renewals, upgrades, and downgrades contributed to overall revenue growth. Without a unified view, identifying high-performing products, industries, and regions was difficult.

- **Incomplete Understanding of Customer Retention and Churn :** Customer churn, revenue contraction, and expansion patterns were tracked across multiple tools, limiting the ability of leadership to understand retention performance and long-term customer value. This created challenges in identifying at-risk accounts and optimizing customer success strategies.
- **Lack of Centralized Revenue Intelligence** Multiple business teams including sales, finance, and customer success relied on separate reports for revenue analysis. This resulted in slow reporting cycles, inconsistent metrics, and limited ability to monitor business performance in real time.

Numerix.ai Solution

Numerix.ai partnered with the client to build a comprehensive revenue intelligence framework that unified subscription, contract, customer, and product data into a centralized analytics environment. The solution focused on four key components.

1. Unified Revenue Data Architecture : Numerix.ai integrated data from multiple operational systems into a centralized analytics layer, creating a single source of truth for business performance. Data sources included:

- Subscription and product revenue systems
- Contract management platforms
- Sales bookings and pipeline data
- Customer account and retention systems

This unified architecture enabled cross-functional teams to analyze revenue performance across the entire customer lifecycle.

2. Revenue and Retention Analytics Framework : Numerix.ai implemented revenue analytics dashboards to monitor core business performance metrics including:

- Monthly recurring revenue (MRR)
- Total revenue by product and account
- Revenue from renewals, upgrades, and new business
- Customer churn and contraction trends
- Net revenue retention and expansion metrics

These dashboards provided leadership with clear visibility into revenue growth drivers and retention performance.

3. Product and Industry Revenue Insights : Interactive dashboards were developed to analyze revenue performance across:

- Product categories
- Industry verticals
- Geographic regions
- Customer segments
- Sales motion and account ownership

These insights enabled leadership to identify which products, industries, and regions contributed most to recurring revenue.

4. Executive Revenue Intelligence Dashboards : Numerix.ai built interactive executive dashboards allowing leadership to monitor key business metrics in real time. The dashboards enabled teams to track:

- Subscription revenue growth
- Product-level revenue contribution
- Contract value and duration
- Customer retention and churn
- Revenue expansion through upgrades

Leadership teams could now quickly identify revenue opportunities and operational bottlenecks across the business.

Key Insights Uncovered

The revenue intelligence dashboards revealed several important insights into the company’s business performance and growth drivers.

- **Renewals Represented the Largest Share of Revenue :** Analysis showed that the majority of revenue was generated through subscription renewals, highlighting the importance of customer retention and long-term contract relationships. This confirmed that recurring revenue was the primary driver of the company’s business model.
- **Expansion Revenue Through Upgrades :** Upgrade revenue contributed significantly to overall growth, indicating strong product adoption and successful upsell strategies within existing customer accounts. Expansion revenue became a key contributor to overall revenue growth.
- **Revenue Performance Varied Across Industries :** Revenue analysis across industry verticals revealed significant differences in revenue contribution across sectors such as

retail, software, finance, and manufacturing. These insights helped leadership identify high-value industry segments driving business growth.

- **Customer Churn Patterns Across Segments** : Churn analysis revealed that revenue contraction was concentrated within specific industry segments and account types. These insights enabled the company to identify at-risk accounts and improve customer retention strategies.

Results

Using Numerix.ai’s revenue intelligence framework, the company gained a centralized and data-driven view of business performance across the customer lifecycle. Key metrics analyzed during the reporting period included:

- **Over \$4M monthly recurring subscription revenue**
- **\$52M+ contract value tracked across enterprise accounts**
- Revenue performance monitored across **multiple global regions**
- **Industry-level revenue segmentation** across key enterprise sectors
- **Recurring bookings exceeding \$6M during peak periods**

These insights enabled the company to better understand revenue drivers and operational performance across the business.

Business Impact

By implementing Numerix.ai’s revenue intelligence dashboards, the company transformed fragmented revenue reporting into a centralized and data-driven decision framework. The organization achieved:

- Clear visibility into recurring revenue growth and expansion drivers
- Improved tracking of renewals, upgrades, and new business performance
- Better understanding of industry-level revenue contribution
- Early identification of churn risks and revenue contraction trends
- Faster and more reliable executive reporting through centralized dashboards

With a unified revenue intelligence platform, the company is now better positioned to optimize revenue strategy, improve customer retention, and scale enterprise growth globally.