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Automating and Curing the Pain of Tracking Net Revenue Retention

The Challenge

This client relied on a variety of metrics to guide their business decisions, but calculating Net Revenue Retention (NRR) was a significant pain point. Obstacles included:

- A fragmented approach to compiling NRR data, requiring manual aggregation from multiple sources
- Time-consuming processes that delayed access to critical metrics for decision-making
- Lack of a centralized system to track and analyze key revenue metrics

The Solution

Using HubSpot's advanced datasets, we developed a dynamic system that turned scattered revenue data into actionable insights. By strategically categorizing revenue streams (such as new revenue, churn, and expansion), automating recurring calculations, and aligning these with deal stages, we transformed HubSpot into a powerful NRR engine. This streamlined the client's ability to calculate and track NRR at any moment—without relying on external spreadsheets or complex integrations.

The Impact

The client now has:

- A centralized source of truth for their most important SaaS metric, eliminating the need for external tools
- Faster access to actionable data, saving time and reducing delays in decision-making
- Improved visibility into revenue trends, enabling better forecasting and strategic planning

The Details

Industry:
SaaS

Business Area:
Revenue Operations

Tools Used:
- HubSpot Datasets

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