



# Driving Business Impact

How to build ROI-backed business cases

# Today's Speakers



**Jordan Esbin**  
CEO & Founder



**Brynn Layton**  
Head of Sales

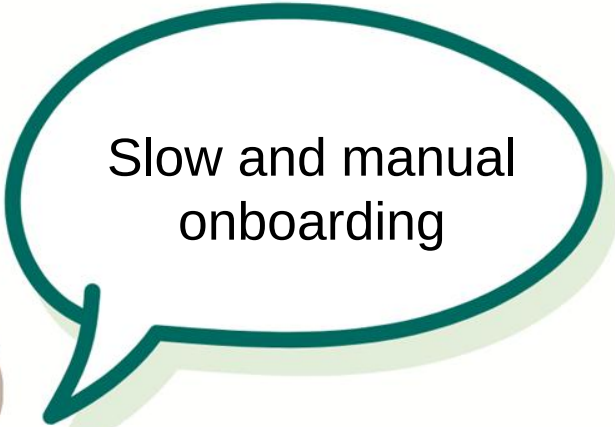


**Melanie Albert**  
VP, Customer Success

**Credit impacts more revenue  
than finance.**

# Lost In Translation


What credit says and what a CFO hears



Slow and manual  
onboarding



CREDIT



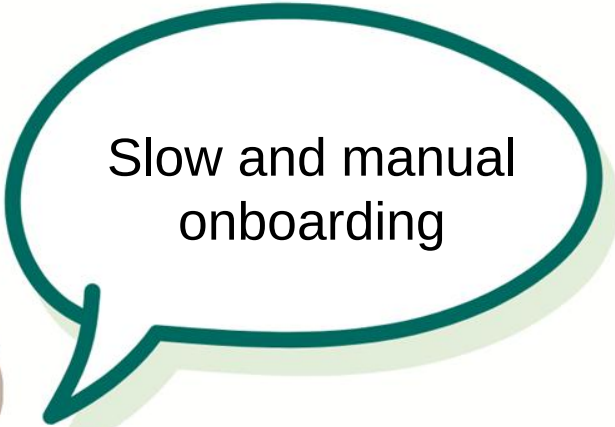
Operational  
inefficiency



CFO

# Lost In Translation

What credit says and what a CFO **should** hear



Slow and manual  
onboarding



CREDIT



**Revenue delayed  
and stuck**



CFO

# Incentives Behind Decisions

Returns matter. And so do careers.



CREDIT

Promotions  
Bonuses  
Visibility

CAPEX  
Returns  
Risk



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# The ROI Expectation Gap

Surfacing and quantifying the full financial impact



CREDIT

Expected Return → **10x**

Realistic Return → **3-5x**



CFO

# How do projects get approved?

# What Gets Funded

If you're solving **two or more**, the conversation changes.



Cash



Margin



Revenue



Risk



Capacity

# The Challenge

- Incomplete financial data limits decision accuracy
- Manual processes slow down approvals
- Inconsistent decisions across analysts
- Missed revenue opportunities due to conservative needs

# The Opportunity

- Increase approvals with better risk segmentation
- Leverage alternative and multi-domain data
- Automate decisions and reduce cost per review
- Compete on speed and customer experience

# Scenarios

Let's talk about some real-world examples



CFO



Credit



Sales

# Building the Business Case

- Quantify revenue uplift from increased approvals
- Model total cost of decisioning
- Demonstrate predictive life with AI + alternative data
- Tie speed to conversion and retention
- Ensure governance, transparency and adoption

# Common Pitfalls

- Focusing only on cost reduction vs. growth
- Underestimating change management
- Lack of trust in AI (black box perspective)
- Over-reliance on a single data source
- Ignoring adoption as a true ROI driver

# Building the Case



Quantify the problem



Identify potential solutions



Present the return-on-investment



# What a winning business case looks like



## **Andrew** | Credit & Collections Manager

### **Looking For:**

- Faster decisions with better data
- Stronger customer onboarding → better O2C
- More efficiency & stronger team

**Solution:** AR & Credit Automation



## THE BUSINESS CASE

# Credit Automation



Manual credit processes delay sales and revenue by **five or more days**.



Digital application with rich, real-time data will allow us to **evaluate customers immediately**.



Reducing onboarding time by 70% or more accelerates **millions in revenue**.

## THE RESULT

“We’re processing new customers in **15 minutes**. Sales loves that they don’t have to wait anymore.”



## THE BUSINESS CASE

# AR Automation



Collections process is manual and **difficult to scale** with aggressive growth goals.



AR automation allows us to manage payment workflows **without growing headcount 150%**.



Avoided hires → **\$240-300k capacity**  
DSP improvement → **\$500k+ working capital**

## THE RESULT

“My last company had 7 collectors. Today, we have 2 with 10x the portfolio. **And we’re more efficient.**”



**Build your business case  
in minutes**

# Business Case Builder

Use our AI-powered Business Case Builder to create, test, and refine a financial case for modernizing your credit operations.



Scan the QR code above to [give it a whirl](#).

### Ask AI

Get instant answers

Hi! Ask me anything.

I need to build a business case for purchasing credit risk management software

Great — you are in the right place. I have helped credit and finance teams at manufacturers, distributors, and wholesalers build exactly this kind of business case, and the numbers are often more compelling than people expect before we run them.

To build a credible, CFO-ready ROI model for you, I just need to pull together some data about your business. Let's start with the fundamentals.

**\*\*Three quick questions to kick things off.\*\***

1. What is your company's total annual revenue?
2. What is your current average Days Sales Outstanding (DSO)? A rough estimate is completely fine.

Type your message...

Send

# Questions?



# Let's talk.

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