

CASE STUDY

Commercial Manufacturer

A Board-Ready Dashboard in Days, and a Forecast Leadership Finally Trusts

NetSuite | dashboards, data insights, and CRO-level strategy



A national manufacturer/distributor had been quoted 200+ hours to build an executive dashboard in NetSuite—one that would still require ongoing maintenance. Adroit Insights moved faster by pairing CRO-level strategy with the client's connected AI, then cleaned up the sales data and trained the team so the numbers behind the dashboard became trustworthy.



Leadership no longer has to dig through complex reports to answer board questions. With the right prompting and design approach, a board-ready dashboard was stood up quickly, enabling self-serve access to the data as questions arise.



For the first time in years, the sales team is consistently entering opportunities with correct forecast dates and auto-calculated ship dates tied to a company standard, giving the fulfillment team forward visibility it never had before.



Sales managers can now see where reps are over-investing in small deals at the expense of larger ones and have re-aligned priorities accordingly. Leadership now has a forecast they can actually trust.



Kristen brought a Chief Revenue Officer mindset to the design and partnered closely with the on-site CRO so the build reflected how leadership actually runs the business.



200+
hours avoided



**Board-ready
dashboard**



**Forecast
leadership
trusts**



Avoided a 200+ hour build and maintenance burden.
Enabled real-time self-serve board reporting.
Improved forecast and ship-date consistency across sales and fulfillment.
Delivered a forecast leadership can trust.



ADROIT
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