

PROPPING UP THE PIPELINE WITH PROPER FORECASTING

Summit developed a forecast to help client navigate the pipeline and how to lift it back up.

Inception Year: 2021



- The client's pipeline was significantly spiraling.
- There's been turnover with COVID.
- Through forecasting, Summit helped the client maintain and grow their pipeline and developed a plan going forward.
- The client now feels like they have control because we work with them regarding the forecast.

BENEFITS TO THE IMPLEMENTATION/SOLUTION

The client can now navigate their pipeline if it dips or is slow.

Industry: Digital

No. of Employees: 10

PY Annual Revenue: \$900K

Client Pays: \$34,112

Service: Controller

- Controller with Tax - Simple Financial Statement
- Forecast
- Business Taxes
- Individual Taxes
- 1099 Taxes



Juliette Bogus

President, Inspired Agency
previously BSquared, LLC

"The team is just stellar. Grateful for them."