THE LININGER GROUP

PORTCO AI PLAYBOOK SERIES · NO. 1

# Revenue Acceleration

*A 90-day path to pipeline clarity, margin expansion, and AI results your board can verify.*

> For sponsors who need their portfolio to move, and for the leaders who need to know exactly where to start.

**$99M/yr**
Incremental purchase volume, from an engine built from zero at Synchrony

**150 bps**
Margin threshold for a defensible AI revenue investment

**90 days**
To first measurable impact

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OperationalAlpha@LiningerGroup.com

EXECUTIVE SUMMARY

# The real problem isn't AI adoption. It's trust.

If you're a sponsor, you've watched a year go by. You see the AI line item in the board deck. You don't see results.

If you're running the business, you're not resisting AI because you think it's a bad idea. You're resisting because every framework you've seen asks you to trust systems you can't validate, commit budgets you don't have, and defend timelines you know are fiction.

This playbook closes the gap by sequencing AI correctly: revenue impact first, infrastructure second, scale third.

## WHAT YOU WILL LEAVE WITH

1. **A clear diagnosis**
   Where your business is leaving revenue on the table, and which gaps AI can close in 90 days versus 12 months.

2. **A case-validated method**
   Drawn from an engine that added $99M a year in incremental purchase volume at Synchrony Financial, across an $87B portfolio and 30+ sales teams.

3. **A phased 90-day framework**
   With outputs, success metrics, and the exact conversation to have with your sponsor at Day 30.

> *AI doesn't create revenue. Precision does. The question is whether your commercial systems are precise enough to capture what's already there.*

## CONTENTS


| | | |
|---|---|---|
| 01 | **Diagnosis** | The four ways revenue systems break, and what each costs |
| 02 | **Case study** | How a $99M-a-year engine was built from zero |
| 03 | **The 90-day playbook** | Three phases, each with an output you can check |
| 04 | **The numbers** | What each phase takes and Year 1 revenue scenarios |
| 05 | **Week 1 without outside help** | Seven actions that need only internal access |
| 06 | **Three AI exercises** | Prompts you can run on your own data this week |
| 07 | **Appendix** | Diagnostic scorecard and glossary |

SECTION 1 OF 7

# Diagnosis: where revenue systems break

Before any AI conversation, you need an honest read on where your revenue system is broken. Most businesses have the same four failure modes, and most don't know which one is primary.

1 **Pipeline opacity**

Your sales team reports numbers. Your board questions them. Nobody agrees on what's real. The CRM is three versions behind, forecast accuracy is under 70%, and deals appear and disappear with no pattern. It's a data integrity problem that looks like a sales problem.

2 **Customer concentration risk**

Your top three customers represent 40%+ of revenue. You know it, and your sponsor knows it. But there's no early-warning system to detect when those relationships start to slip, until a renewal conversation goes sideways.

3 **Cross-sell blindness**

You have more products than your team can sell. Reps default to the easiest SKU in every conversation, so the margin mix is worse than it needs to be. It's a signals problem, not a training problem: your team doesn't know which products belong in which conversation.

4 **Margin erosion by exception**

Discounting decisions live with individual reps. Deal structures vary by relationship, not logic. Average deal margin falls 50–80 bps a year with no clear cause. Finance has one answer, sales has another, and neither is grounded in data.

### Why standard frameworks fail here

Every major consulting firm has a revenue AI framework. They share one flaw: they assume you have 18 months, a clean data environment, and a team with bandwidth to manage an implementation.

You have none of those. You have a sponsor who wants results, a leadership team already at capacity, and a CFO who has to defend every dollar of software spend to a

board that remembers the last failed CRM rollout. This framework starts with the smallest footprint that produces visible, defensible revenue impact, and expands only after it earns the right to.

## THE COST OF WAITING

| What you're losing | Estimated annual impact |
|---|---|
| **Pipeline opacity**<br>70% forecast accuracy vs. an 85% peer benchmark | $2–8M in missed close timing per $100M of revenue |
| **Cross-sell blindness**<br>One product per conversation by default | 15–25% revenue uplift left on the table |
| **Margin erosion by exception**<br>Unmanaged discount drift | 50–100 bps of margin compression a year, compounding |
| **Customer concentration**<br>No early warning | One surprise non-renewal = a 10–20% revenue cliff |

SECTION 2 OF 7

# Case study: $99M a year, built from zero

Built by Rebecca S. Lininger as VP, Commercial Analytics & Sales Force Effectiveness at Synchrony Financial, pre-IPO through 2019.

| $87B | $99M/yr | 30+ | Chairman's MVP |
|---|---|---|---|
| Portfolio | Incremental purchase volume | Sales teams | Recognition |

### The starting point

Synchrony Financial was preparing for its IPO. Commercial analytics was fragmented across 30+ sales teams, each with different data definitions, success metrics, and views of the customer. There was no shared commercial intelligence layer, no shared lead-scoring logic, and no systematic cross-sell engine.

The problem wasn't a lack of data. Synchrony had more data than most companies ever see. None of it was connected to commercial behavior in a way that changed what reps did on Monday morning.

### What was built

| Component | What it did |
|---|---|
| Commercial Analytics COE | Built from zero. One source of truth across the $87B portfolio: standard definitions, standard metrics, one view of performance for every sales team. |
| Behavioral signals | Connected transaction data to commercial triggers: which customers were expanding, which were thinning, which product combinations predicted retention. Signals became prompts reps acted on, not dashboards to review. |

| Component | What it did |
|---|---|
| Visit Impact | Measured the incremental return of every sales touch and replaced rep intuition with a signal-driven recommendation: the right product, for the right customer, at the right moment. This added $99M a year in incremental purchase volume. |
| Forecast and pipeline support | Coached every field sales leader on forecasting and pipeline reviews with shared definitions, built to hold up in an IPO roadshow and a board review. |

**What made it work**

- **Friction first.** The first question was what cost the sales team the most time and the most deals. Everything else was sequenced from that answer.
- **Data before AI.** Machine learning came in only after the data was clean enough that a bad model couldn't poison it.
- **Adoption by design.** Tools were built around what reps already did, not what we wished they would do.
- **The "so what?" test.** If a model only confirmed what experienced reps already knew, it didn't make the cut.

**What this means for your business**

You don't have an $87B portfolio, and you don't need one. The same sequence (friction first, data integrity second, AI third) works at $50M of revenue as readily as at $50B. The build scales to your size; the method doesn't change.

SECTION 3 OF 7

# The 90-day revenue acceleration playbook

Three phases. Each builds on the last, and each has an output you can check on its own, so your sponsor doesn't wait 90 days to know whether it's working.

## PHASE 1 · WEEKS 1–4 Diagnose and commit to one win

| | |
|---|---|
| **Failure mode audit** | Map your primary revenue failure mode with the diagnostic scorecard in the Appendix. A 2–3 day working session with sales leadership and finance is enough. |
| **Data inventory** | Compare the data you have with what you'd need. The goal is a go/no-go decision on which revenue initiative you can execute in your current data environment. |
| **Quick win selection** | Pick one initiative with visible, measurable output inside 60 days. One thing that works is worth ten that don't. |
| **Baseline metrics** | Lock in current numbers before anything changes: forecast accuracy, pipeline conversion by stage, average deal margin, and top-customer revenue concentration. |

**PHASE OUTPUT**

A one-page initiative brief: the chosen initiative, baseline metrics, data requirements, and success criteria.

**WHAT IT TAKES**

Sales leadership and finance for a 2–3 day working session, plus analytics setup.

## PHASE 2 · WEEKS 5–8 Build and validate

| | |
|---|---|
| **Data architecture** | Stand up the minimum data layer for your initiative: the smallest integration that produces a reliable signal. |
| **Model development** | Build the first version of your signal engine. For pipeline, a stage-progression model. For cross-sell, a product-affinity cluster. For margin, a discount-driver analysis. |
| **Rep-facing tool** | Put the signal where reps already work: a field in Salesforce or a weekly email, not a new dashboard that needs a login. |
| **Feedback loop** | Run two sales cycles with the tool live. Collect specific cases where the signal was right, where it was wrong, and why. |

**PHASE OUTPUT**

A validated signal engine with a documented accuracy rate and at least five confirmed cases where it changed a rep's decision.

**WHAT IT TAKES**

Data engineering, model build, and CRM integration. Effort depends most on your data quality, which Phase 1 sizes.

## PHASE 3 · WEEKS 9–12 Harden and hand off

| | |
|---|---|
| **Accuracy hardening** | Tighten the model with Phase 2 feedback. Aim for consistency, not perfection: a model that's right 75% of the time and trusted beats a perfect one nobody uses. |
| **Documentation** | Write the operating manual: what the signal means, when a rep should act on it or override it, and who owns it. |
| **Day 90 report** | Baseline versus current metrics, documented ROI, and a forward projection to Year 1. |
| **Next phase scoping** | Define the next initiative while momentum is high. You now have proof, a method, and a team that knows how to use it. |

**PHASE OUTPUT**

The Day 90 ROI report, operating documentation, and a scoping brief for the next phase.

**WHAT IT TAKES**

Model hardening, documentation, and reporting, with the owner named for ongoing use.

SECTION 4 OF 7

# The numbers: what to expect and when

These ranges reflect lean, focused implementations, not enterprise programs. Adjust for your revenue base and starting data quality.

## WHAT EACH PHASE TAKES

| Phase | Timing | Primary work |
|---|---|---|
| 1 · Diagnose | Weeks 1–4 | Working session, data inventory, baseline metrics |
| 2 · Build | Weeks 5–8 | Data layer, signal model, CRM integration |
| 3 · Harden | Weeks 9–12 | Model tuning, documentation, Day 90 report |

Outside spend depends mostly on the state of your CRM and data, so size it in Phase 1 before you commit to Phase 2. The method requires no new platform license.

## REVENUE IMPACT SCENARIOS, YEAR 1

Illustrative, modeled on a $75M revenue business; scale proportionally. Conservative assumes lower data quality and moderate adoption. Upside assumes a clean CRM, high adoption, and two successful use cases from Phase 2.

| Scenario | What happens | Revenue impact | Margin |
|---|---|---|---|
| **Conservative** | One use case, partial adoption; forecast improvement only | +$1.5–2.5M | +50–75 bps |
| **Base** | Two use cases, standard adoption; cross-sell plus pipeline accuracy | +$3–5M | +100–130 bps |
| **Upside** | Three use cases, high adoption; full COE build and sponsor visibility | +$6–10M+ | +150 bps or more |

## WHERE THE RETURN COMES FROM

| Lever | Typical effect |
|---|---|
| Forecast accuracy | Less deal slippage; quarter-end revenue capture up 3–7% |
| Cross-sell signals | Average revenue per customer up 15–20% in activated accounts |
| Discount discipline | Average discount down 1–2 percentage points, straight to margin |
| Churn early warning | Customer relationships extended 4–8 months when flagged at the right point |

SECTION 5 OF 7

# Getting started: Week 1 without outside help

You don't need a consultant to start. These seven actions need only internal access and honest answers. Finish them before any vendor conversation.

1 **Pull four quarters of close data**
Calculate your real forecast accuracy: not what the CRM shows, but what closed versus what was committed at Day 60 of each quarter.

2 **Interview your top three salespeople**
Ask: "What do you do differently than everyone else?" Their answers are your cross-sell and qualification signals.

3 **Map your top 10 customers by revenue**
For each, what is their second product? If you can't answer in 30 seconds, you have cross-sell blindness.

4 **Pull average deal margin by rep and segment**
If the range is more than 5 percentage points, you have a discount discipline problem.

5 **Calculate customer revenue concentration**
If your top three customers are more than 30% of revenue, name the executive who holds each relationship. If it's you, that's a retention risk.

6 **Score your CRM data quality**
Rate completeness, accuracy, and timeliness 1–5 each. Below 3 on completeness means Phase 2 needs a data cleanup sprint first.

7 **Define your one win**
Which failure mode costs you the most? Write it in one sentence and share it with your sponsor before engaging anyone outside.

## COMMON PITFALLS

| Pitfall | How to avoid it |
|---|---|
| Chasing three initiatives at once | The instinct is to attack every failure mode at once. The result is progress on none. Pick one, finish it, then pick the next. |
| Starting with the technology | No vendor demo before your failure mode audit. Vendors solve the problem they sell; your job is to define the problem you have. |
| Treating adoption as an afterthought | The best model is worthless if your team doesn't use it. Build around the existing workflow first; accuracy is the second problem. |
| Over-promising to your sponsor | Commit to the conservative scenario, then deliver the base. Sponsors surprised upward become advocates. |

SECTION 6 OF 7

# Three AI exercises you can run this week

No vendor contract or data science team required. Each exercise uses tools you can access today, runs on your own data in an afternoon, and maps to one failure mode.

**Before you start: never put company data into a free AI tool.**

Free tiers of AI tools, including ChatGPT, Claude, and Gemini, may use your inputs to train their models, so anything you paste could be retained or exposed. A paid Claude subscription starts at about $20 a month; Google Workspace with Gemini starts at about $14 a month. Either gives you business-grade data protection. Confirm with IT or legal which one you already have.

## 1 Pipeline diagnosis

Addresses: Pipeline opacity

Turn two years of closed-won and closed-lost deals into an executive pattern brief in under an hour.

**Set up:** Open Claude (paid) or Gemini (Google Workspace). Paste your deal data as a table or upload a spreadsheet.

PASTE THIS PROMPT

I'm sharing a table of our closed-won and closed-lost deals from the past 24 months. Each row includes deal size, industry, product sold, sales rep, days in pipeline, and outcome. Tell me: (1) which deal characteristics most strongly predict a win, (2) which pipeline stage shows the highest drop-off, and (3) the top three differences between our best-performing rep and our average rep. Format the findings as a one-page executive summary I can share with my board.

| | |
|---|---|
| **What you'll get** | A pattern brief your CFO and sponsor can read in five minutes, and a baseline for choosing your Phase 1 initiative. |
| **Time required** | 45–60 minutes, including data prep |

## 2 Cross-sell signals

Addresses: Cross-sell blindness

Find which products belong together using your own customer data, not vendor assumptions.

**Set up:** Same tool. Paste or upload your customer-product table.

> **PASTE THIS PROMPT**
>
> Here is a list of our top 50 customers, their primary product, their secondary product (if any), their annual revenue with us, and their industry segment. Tell me: (1) which product combinations appear most often in our highest-revenue customers, (2) which customer segments most often hold only one product, and (3) write a one-paragraph talking track a rep could use to open a cross-sell conversation with a single-product customer in our largest segment.

| | |
|---|---|
| **What you'll get** | A product affinity map and a rep-ready opener: the manual prototype of the cross-sell engine you'll build in Phase 2. |
| **Time required** | 45–60 minutes, including data prep |

## 3 Discount discipline

Addresses: Margin erosion

Identify which deal characteristics predict below-average margins, without building a model.

**Set up:** Same tool. Paste your deals table with discount and margin columns.

> **PASTE THIS PROMPT**
>
> I'm sharing a table of 50 deals closed in the last 12 months. Each row includes deal size, discount percentage, product, rep name, customer segment, and deal margin. Tell me: (1) whether discount percentage follows deal size, (2) which rep or segment shows the widest margin variance, and (3) what discount approval threshold would protect 80% of my margin without slowing deals, based on this data. Answer in plain language, with no statistics jargon.

| | |
|---|---|
| **What you'll get** | A discount threshold recommendation and a margin variance map, enough to start a discount governance conversation with your CFO this week. |
| **Time required** | 30–45 minutes, including data prep |

> *These three exercises are the manual version of what Phase 2 automates. If any output surprises you, that's your Phase 1 initiative.*

SECTION 7 OF 7

# Appendix: diagnostic scorecard and glossary

Score each statement from 1 (strongly disagree) to 5 (strongly agree). Your highest-scoring cluster is your primary failure mode and your Phase 1 target.

| Score (1–5) | Statement |
|---|---|
| **PIPELINE OPACITY** | |
| ___ | Our Day 60 forecast accuracy is below 80%. |
| ___ | Sales leadership and finance use different pipeline numbers in the same board meeting. |
| ___ | We can't identify which pipeline stage causes the most slippage. |
| **CROSS-SELL BLINDNESS** | |
| ___ | Our average customer holds fewer than two of our products. |
| ___ | We can't tell a rep which product to recommend next for a given segment. |
| ___ | Our top sellers cross-sell better, and we can't explain why. |
| **MARGIN EROSION** | |
| ___ | Reps make discount decisions without a standard approval framework. |
| ___ | Average deal margin has declined in two of the last three years. |
| ___ | We can't identify which deal characteristics predict below-average margin. |
| **CUSTOMER CONCENTRATION** | |
| ___ | Our top three customers are more than 30% of revenue. |
| ___ | We have no systematic early warning for churn or a slipping relationship. |
| ___ | Renewals depend on relationships, not signals. |

## GLOSSARY

**Commercial Analytics COE**

A center of excellence that owns the data definitions, models, and tools for commercial decisions across sales teams.

**Choreographed Intelligence™**

The Lininger Group's Lean process architecture: complex exceptions go to AI, and linear business logic goes to automation you pay for once, so you don't pay for compute you don't need.

**Signal-to-action gap**

The gap between what your data knows and what your sales team does about it. The primary target of this playbook.

**150 bps**

150 basis points, or 1.5 percentage points of margin. The threshold for a defensible AI revenue investment.

## Want help putting this to work?

The Lininger Group leads this work alongside your team on a monthly retainer. The first 30 days set the plan and the baselines.

**OperationalAlpha@LiningerGroup.com · LiningerGroup.com**