RevOper

The Revenue Intelligence Platform for Fractional Executives

PAVE AMERICA · independence PET GROUP · FORTNA · LucidLink · sylvan

2025

revoper.com

You're Fling Blind - and So Are Your Clients

82%	85%	$12.9m
of companies are making decisions based on stale information.	of executives state stale data is leading to incorrect decisions and lost revenue.	data chaos costs companies an average of $12.9M annually.
McKinsey	**Dimensional Research**	**Gartner**

Sound familiar?

- CRM data is messy and inconsistent across groups and divisions

- Pipeline visibility varies from team to team

- Forecasts are fragile and often over-optimistic

- No consistent view of pipeline health across the company

**Clients want confidence, clarity, and results - fast**

The Fog of Data Chaos

Disconnection Hides Revenue Growth.

Data Silos: Disconnected CRM, finance, and marketing tools don't talk to each other — creating blind spots and broken visibility.

Blind Spots: You miss critical inefficiencies and hidden risks that directly impact pipeline health, rep performance, and forecast accuracy.

Revenue Leakage: Opportunities slip through the cracks. Performance gaps go unspotted. The cost? Millions lost silently every year.
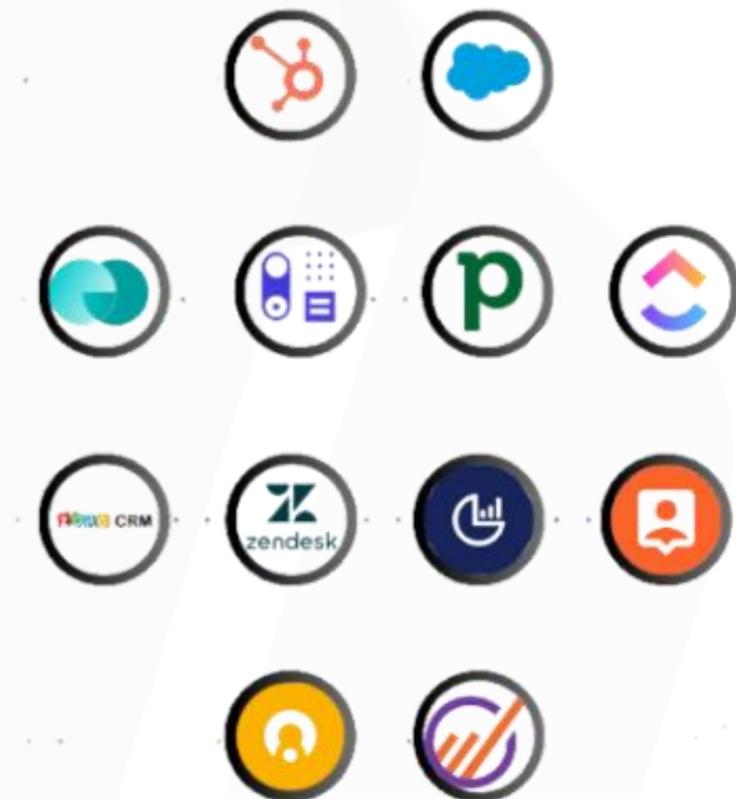
Without clarity, every decision feels like a shot in the dark.

Turn Data Chaos Into Competitive Advantage

RevOper is the AI-powered revenue intelligence platform that connects directly to your clients tech stack.

What We Do

Use APIs, real-time data centralization, automated mapping, and AI to create an objective single source of truth for past, present, and future revenue performance of a company.

Revenue Analyst in a Box

Every fractional exec needs to deliver smarter insights, faster decisions, and repeatable wins - without hiring more people.

We built RevOper to bring clarity to company health, so management teams and advisors can accelerate growth, sharpen value creation, and deliver bigger exits.
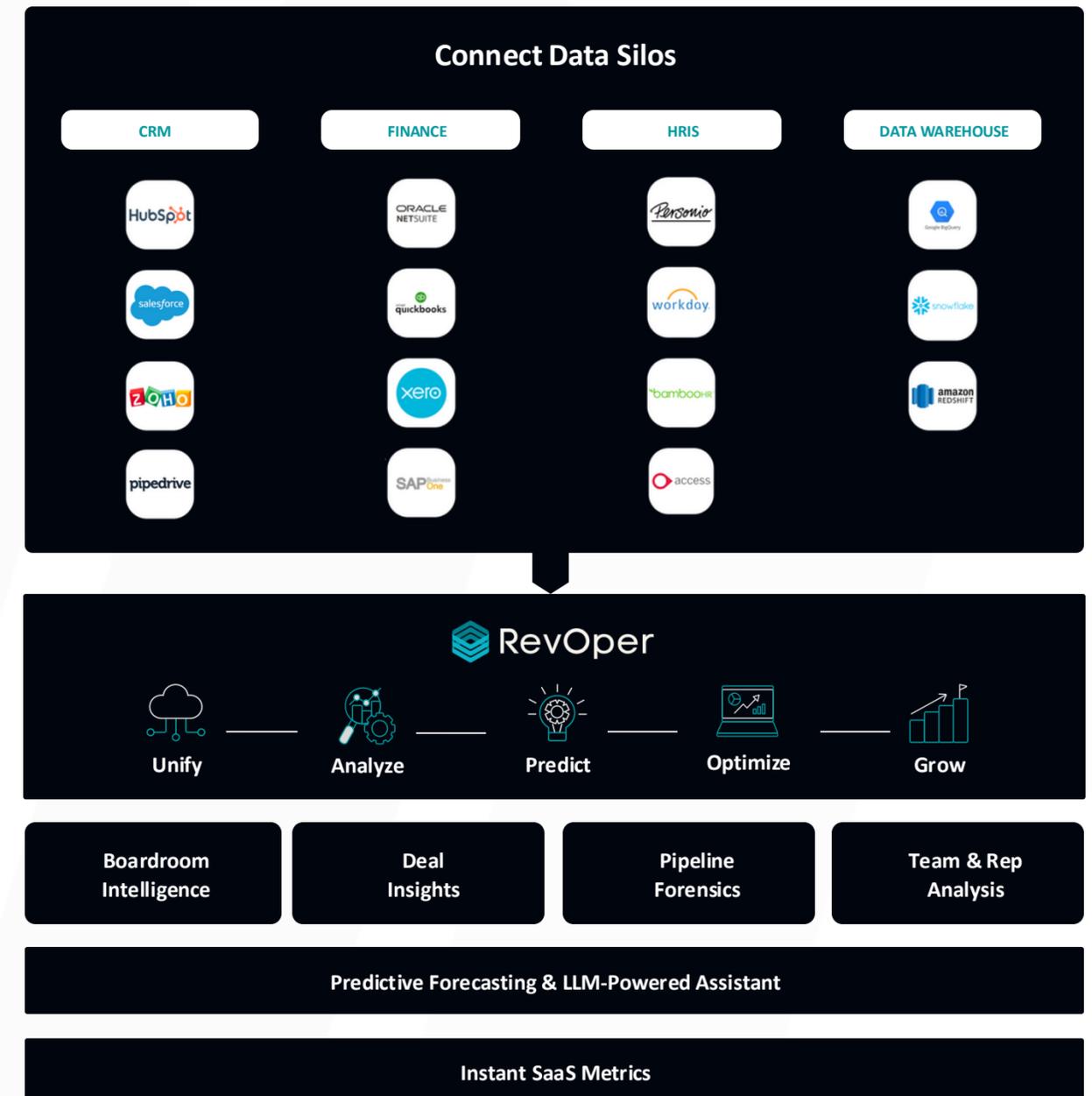
The Frankenstack vs RevOper

Third-Party Solutions

RevOper

Third-Party Solutions	RevOper
CRM, Finance, and HR data live in silos that require manual stitching or ETL tools like Fivetran, Stitch etc.	Direct API integrations to CRM, Finance, and HR systems. No ETL tools or custom connectors needed
A separate data warehouse required. Often Snowflake, Redshift, or BigQuery.	Built-in data warehouse automatically stores and unifies all revenue-critical data
Separate dashboarding tools required. Power BI, Tableau, Looker – all sold separately	Integrated dashboarding & visualizations. No need for Tableau, Power BI, or Looker
No pre-built insights. Must manually build dashboards, KPIs, and models from scratch. All backward looking.	1000s of pre-built KPIs, dashboards, & reports. Powered by AI for forward-looking performance and forecasting
Specialized RevOps or data engineers required. Ongoing cost, slow time to value	No specialized resources needed Live within hours with minimal ongoing support
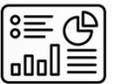
Vs.

RAN™: Revenue Assurance Number

A single index that shows how likely your GTM team is to hit its forecast - built from real-time operational and performance data.

Powered by Core Metrics:

Forecast Accuracy

Pipeline Coverage

Conversion Rates

Rep Productivity

Pushed Deals

Time in Stage

Win/Loss & Velocity Analysis

Scoring Scale: 0 - 4 (Low) 5 -7 (Medium) 8-9 (High)

"It's the credit score for your GTM motion."

RAN™ in Action
3 Phases of Impact

Phase 1: Revenue Diagnostics

Use RAN™ to uncover hidden risks and performance gaps before or at the start of an engagement. Quickly identify where revenue is leaking, why reps miss quota, and which parts of the funnel are broken.

Phase 2: Deep Monitoring During Engagements

Use RevOper to track performance, run experiments, monitor progress, and keep leadership aligned. Perfect for 100-day plans, playbook execution, and high-impact QBRs.

Phase 3: Post-Engagement Governance Layer

Even after you roll off, RevOper stays behind to support the team. Use it as a recurring QBR platform, or stay engaged with ongoing strategic oversight powered by live metrics.

RevOper Sales Enablement

2 Weeks

- Discovery call with company (client)
- Demo of RevOper
- Proposal & pricing alignment
- MSA & Order Form issued
- Project Charter agreed (post contract signatures)
- Deployment
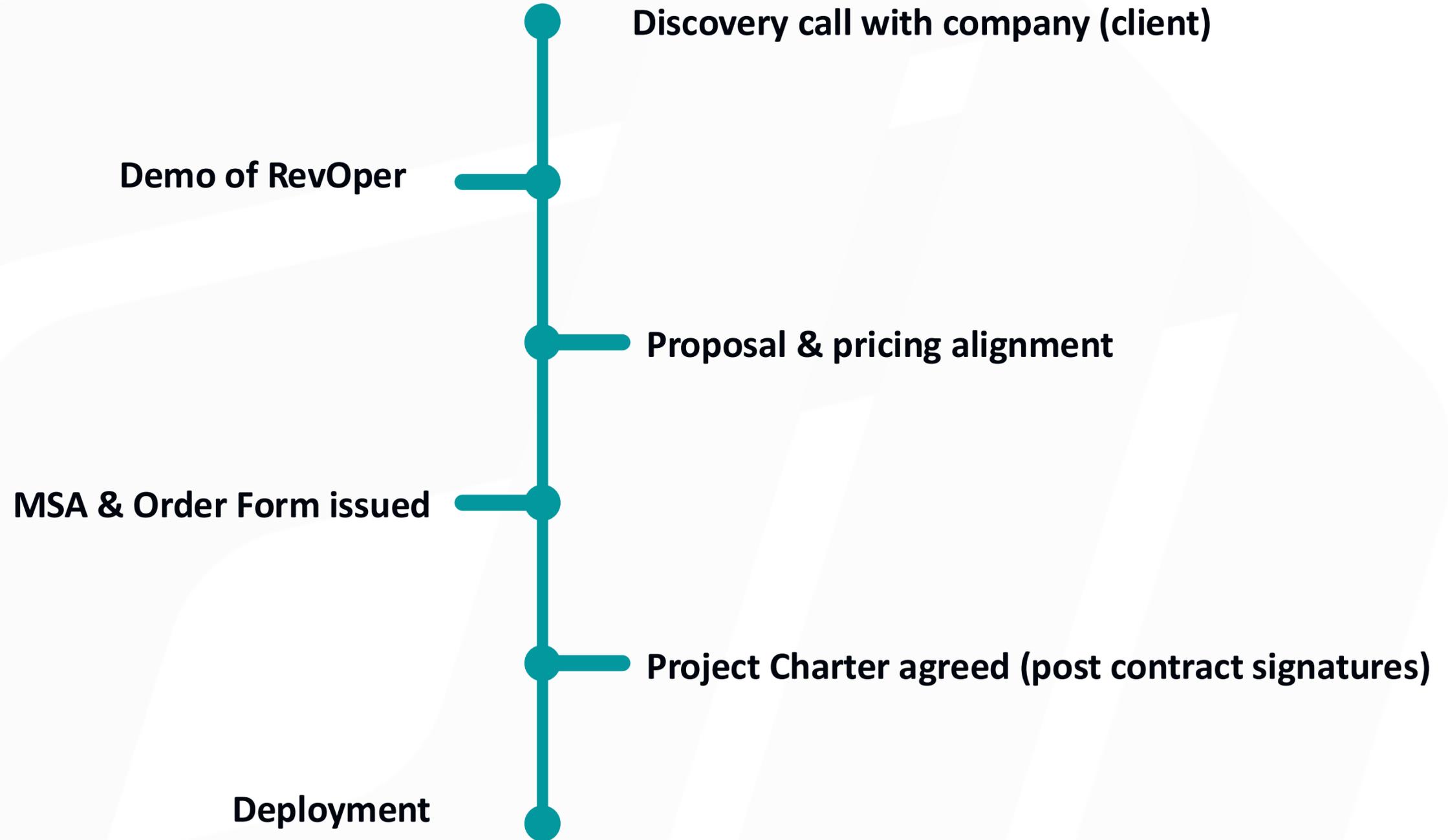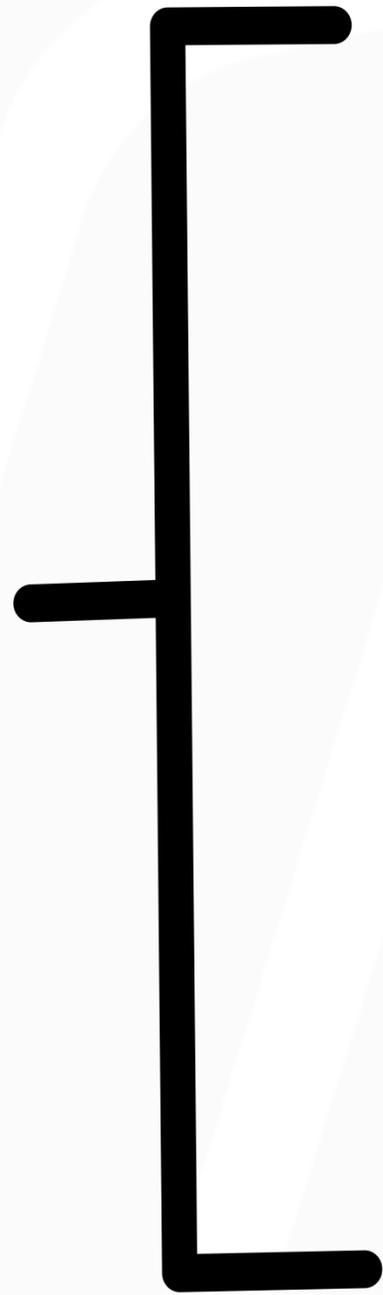
Tools, Not Toys
Why Fractional Advisors Choose RevOper

✓ **Instant Deployment:** Salable, tech-powered value creation at speed and low-lift.

✓ **AI-Driven Insights:** While other companies look in the rear-view you can add a powerful AI-powered view of the future.

✓ **Ongoing Visibility, Not Just One-Offs:** Use RevOper as the foundation for QBRs, value creation sprints, and revenue growth programs - staying lean and delivering value from day 1.

✓ **Custom to Your Playbook:** Incorporate your benchmarks, analysis styles, & value creation frameworks.

✓ **System Agnostic:** Work across messy CRM setups, fragmented data, and siloed systems. No more heavy lifting for your team.

✓ **Secure, Flexible & Scalable:** Enterprise-grade. Trusted by teams fighting complex data problems.

✓ **No Guesswork:** Replace hunches with real-time answers to what's working, what's broken, and where to intervene.

Competitive Landscape

Most platforms that claim to solve the data problem fall short:

1. Rigid and slow to set up (Salesforce, Tableau)
2. Fast but tactical-only (Gong, Ebsta)
3. Strategic, but heavy and complex (Clari, Anaplan)

RevOper is different.

- Strategic insight.
- Instant deployment.
- Built for flexibility.
- No IT projects.
- No waiting.

Just clarity and action — from day one.

HIGH

SRTATEGIC IMPACT

Clari

Anaplan

RevOper

GONG

tableau
Power BI

INSIGHT**SQUARED**

salesforce

ebsta

HubSpot

LOW

ADAPTABILITY

HIGH
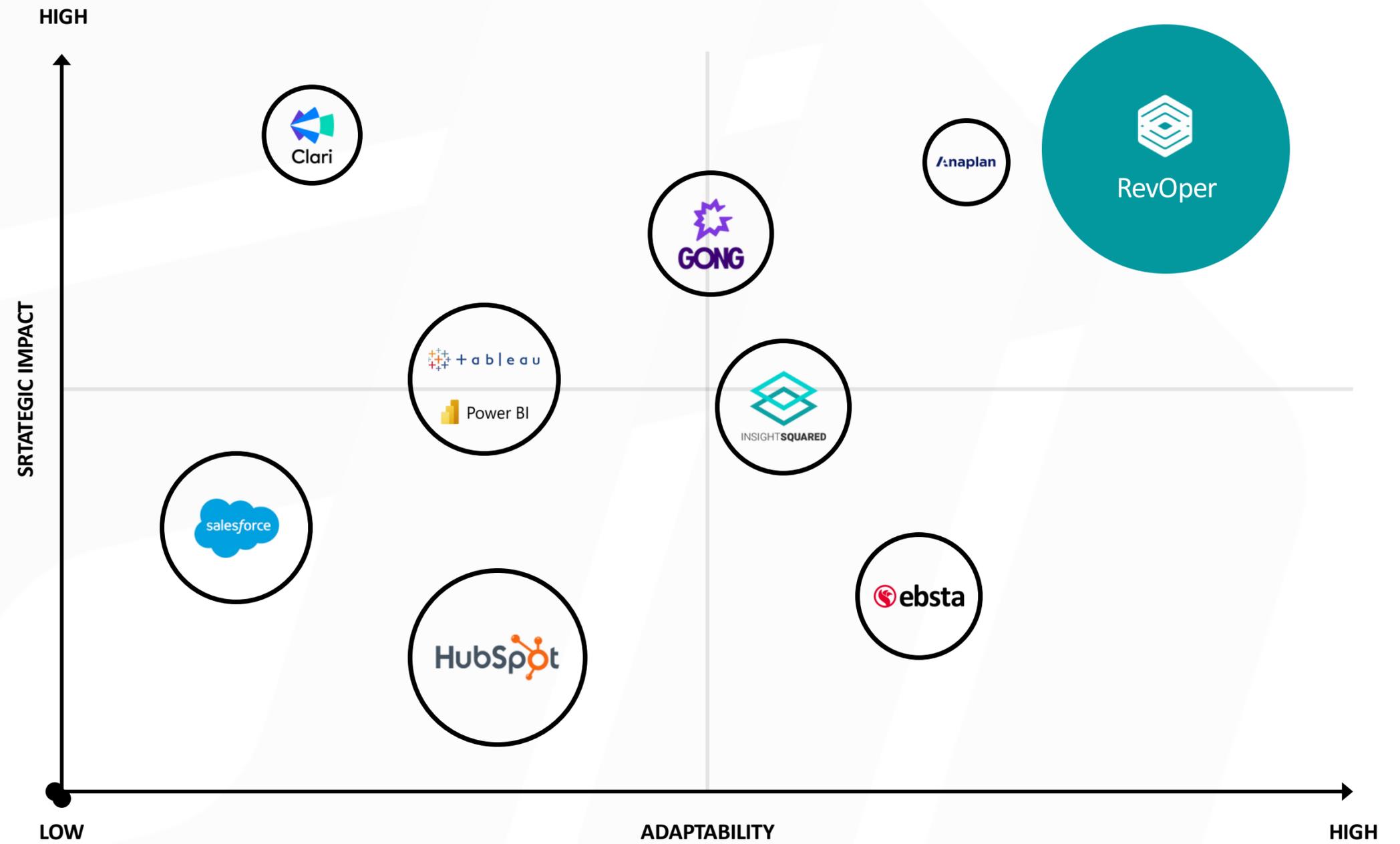
BUBBLE SIZE = SPEED TO VALUE
Time from implementation to insight. Larger = faster

Built for Fractional Use Cases

Commercial Due Diligence

Run rapid GTM diligence -quickly identify red flags in pipeline, forecasting, and rep performance.

Conversion Rate Diagnostics

Diagnose where deals stall and why—down to stage, vertical, or rep - then run experiments to improve flow.

100 Day Action Plan

Build, model, and track 100-day commercial value creation plans with real-time feedback loops.

Boardroom Intelligence

Auto-generate board-ready decks on revenue health, GTM execution, & where the company is trending.

Sales Capacity Planning

Model rep productivity, territory coverage, and future headcount needs based on trends.

Post-Merger Integration

Unify disparate sales data and align on a single version of truth across merged entities

Why Operating Teams Win with RAN™

✓ Easily deployed across multiple companies/divisions with minimal lift

✓ Continuous insights drive ongoing performance improvement

✓ Real-time data accelerates senior decision-making

✓ Back every boardroom or management move with hard data
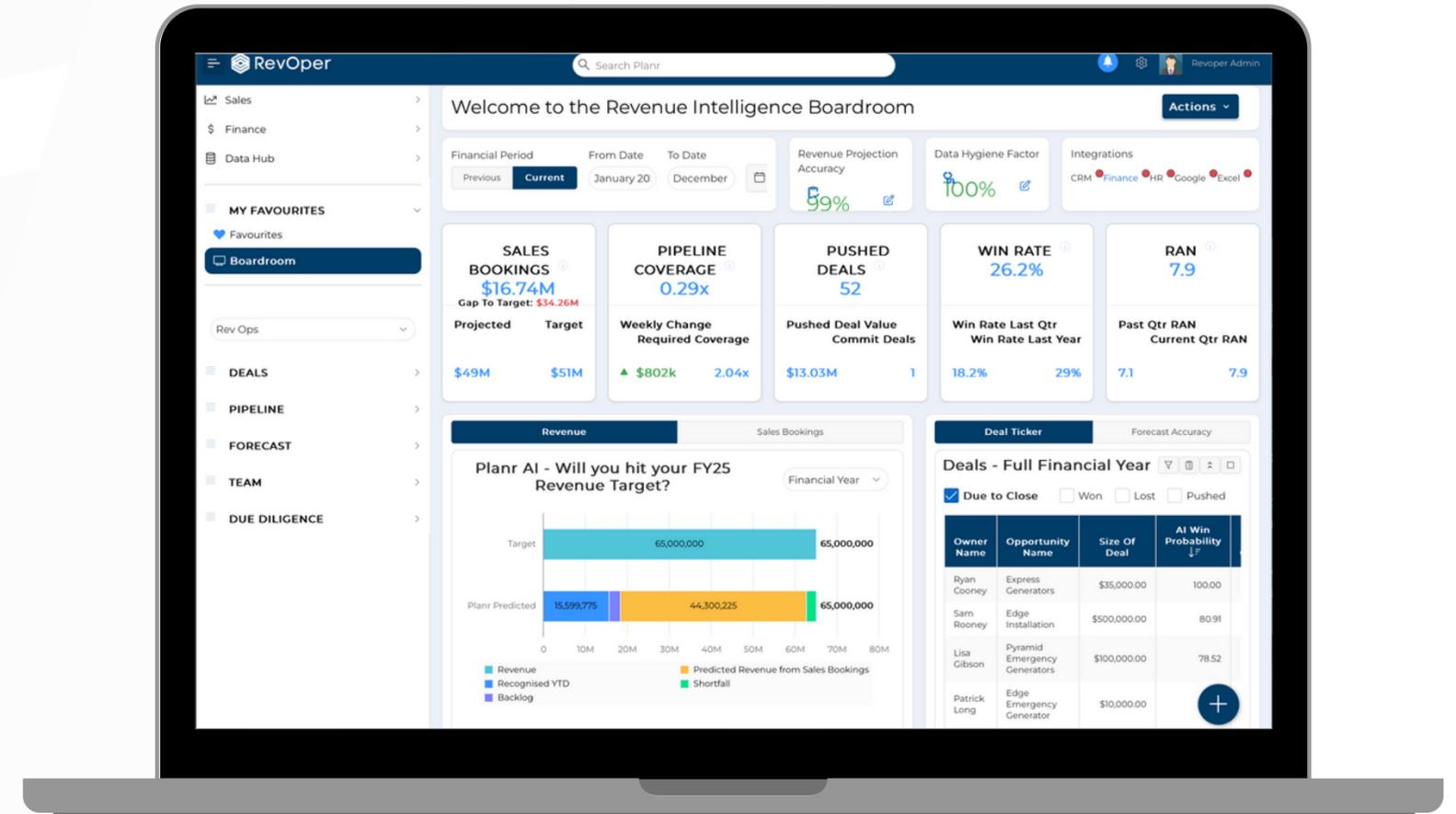
Most sales orgs operate with 45–55% forecast accuracy. With RevOper, operators have **90–96% accuracy across portfolios—turning gut feel into science.**

Background

Our founders bring deep SaaS and operational expertise from their time leading CoreHR—a payroll and HR SaaS business generating over $50M in revenue and serving global giants like PepsiCo, Amgen, and Pfizer. At CoreHR, Sean Murphy (CEO), Owen Pagan (CRO), and David Welch (CTO) built a legacy of driving operational excellence and scalable growth. Following the successful sale of CoreHR to JMI Equity in 2016, the team remained directors while also leveraging their hands-on experience to further invest in innovative tech companies.

During this period, the first version of what would become Planr was conceived within TDS, an agile enterprise SaaS platform for access control and visitor management. As they worked with multiple portfolio companies, our founders recognized a critical gap: a need for a closed-loop, enterprise-grade AI platform that could provide real-time, actionable insights to drive value creation across the investment lifecycle.

Planr was born as an internal tool to help new investors gain immediate clarity on bookings and revenue performance— proving so effective that it fueled a 3.5x revenue increase over three years, all while remaining fully bootstrapped.

Following further R&D and a renewed focus on the challenges faced by private equity firms and portfolio companies, Planr was officially launched in 2020. Today, Planr embodies our founders' relentless drive to equip investors with powerful insights that fuel growth, streamline operations, and unlock maximum enterprise value.

Leadership Team

Owen Pagan
CEO & Co-Founder

Former CRO, Owen has helped scale high-growth SaaS companies, including CoreHR and TDS. As an Operating Partner and investor, he works closely with PE funds to drive commercial strategy and portfolio value creation.

David Welch
CTO & Co-Founder

David is a seasoned SaaS technology leader who leads the product and engineering teams at RevOper and Planr, building scalable data infrastructure and AI tools that power real-time insights and decision-making.
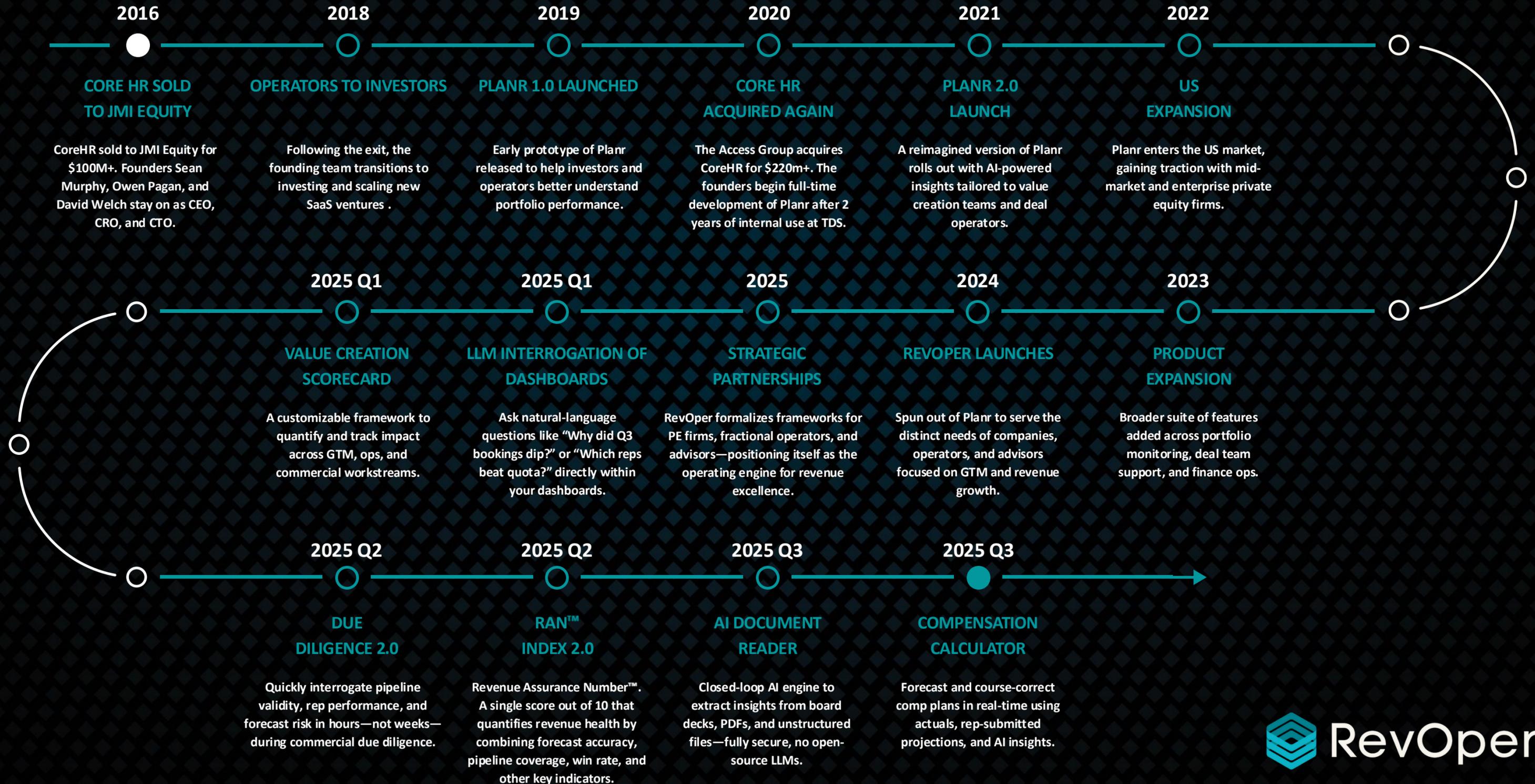

Sean Murphy
COO & Co-Founder

Former CEO, Sean has helped guide and scale multiple SaaS companies, including CoreHR and TDS. As an experienced investor, he has worked alongside PE funds as both a board member and co-investor.

Our Journey & What's Ahead

2016 — CORE HR SOLD TO JMI EQUITY
CoreHR sold to JMI Equity for $100M+. Founders Sean Murphy, Owen Pagan, and David Welch stay on as CEO, CRO, and CTO.

2018 — OPERATORS TO INVESTORS
Following the exit, the founding team transitions to investing and scaling new SaaS ventures .

2019 — PLANR 1.0 LAUNCHED
Early prototype of Planr released to help investors and operators better understand portfolio performance.

2020 — CORE HR ACQUIRED AGAIN
The Access Group acquires CoreHR for $220m+. The founders begin full-time development of Planr after 2 years of internal use at TDS.

2021 — PLANR 2.0 LAUNCH
A reimagined version of Planr rolls out with AI-powered insights tailored to value creation teams and deal operators.

2022 — US EXPANSION
Planr enters the US market, gaining traction with mid-market and enterprise private equity firms.

2023 — PRODUCT EXPANSION
Broader suite of features added across portfolio monitoring, deal team support, and finance ops.

2024 — REVOPER LAUNCHES
Spun out of Planr to serve the distinct needs of companies, operators, and advisors focused on GTM and revenue growth.

2025 — STRATEGIC PARTNERSHIPS
RevOper formalizes frameworks for PE firms, fractional operators, and advisors—positioning itself as the operating engine for revenue excellence.

2025 Q1 — LLM INTERROGATION OF DASHBOARDS
Ask natural-language questions like "Why did Q3 bookings dip?" or "Which reps beat quota?" directly within your dashboards.

2025 Q1 — VALUE CREATION SCORECARD
A customizable framework to quantify and track impact across GTM, ops, and commercial workstreams.

2025 Q2 — DUE DILIGENCE 2.0
Quickly interrogate pipeline validity, rep performance, and forecast risk in hours—not weeks—during commercial due diligence.

2025 Q2 — RAN™ INDEX 2.0
Revenue Assurance Number™. A single score out of 10 that quantifies revenue health by combining forecast accuracy, pipeline coverage, win rate, and other key indicators.

2025 Q3 — AI DOCUMENT READER
Closed-loop AI engine to extract insights from board decks, PDFs, and unstructured files—fully secure, no open-source LLMs.

2025 Q3 — COMPENSATION CALCULATOR
Forecast and course-correct comp plans in real-time using actuals, rep-submitted projections, and AI insights.

RevOper

Use Cases

RAN Tracking

Track RAN scores across your portcos to spot top performers and early risk signals.

KPI Alignment Across Portcos

Standardize metrics across portfolio companies for benchmarking and portfolio reviews.

Fund-Level Value Creation Tracking

Track value creation efforts across portcos and see what's really working.

Boardroom Intelligence

Auto-generate board-ready decks on portfolio health, value creation, & where the portfolio is trending.

Instant Roll-Up Reporting

Roll up data across funds with different structures to give leadership and LPs a unified view.

Unified View for Ops

Give ops teams one view across finance, GTM, and performance—tailored to what matters most.

Use Cases

Rep & Team Reviews

Benchmark reps and regions using AI-powered attainment, velocity, and win rate comparisons.

Exit Readiness Planning

Exit Readiness Monitoring: Surface and track revenue metrics that tie directly to enterprise value

Forecast Audits

Pinpoint unreliable pipeline, highlight sandbagging or over-optimism, & generate unbiased forecasts.

As part of our partnership, RevOper will support co-developing tools, and features tailored specifically to your methodologies and workflows. Whether it's embedding elements of your playbook or creating repeatable templates for diligence, 100-day plans, or board reviews, we're committed to helping your fund deliver value faster and more consistently across portfolio value creation.

Pipeline Health Reviews

Track stage velocity, pipeline coverage, and identify aging risk

Some of Our Clients