

Nonprofit SaaS

At a glance

An early stage startup desperately sought to formalize operational cadences to help them form into a fully functional business with a product, team, and revenues that would attract VC funding.

CHALLENGES

Early in the organizations development, the founder needed someone to come in and take over operations and support building a team and processes that will lead them to their Series B raise and regional expansion.

SOLUTIONS

JPM audited existing processes and documentation and facilitated the company's accounting, human resources, product, sales, marketing, and customer success operations. They worked to grow the org to 26 FTE's across disparate teams and opened their East Coast office. They eventually came to oversee Revenue Operations focusing on sales and customers success enablement.



Operations
Management



Regional
Expansion



Technical Sales
Enablement

BENEFITS

1

Operational Efficiency

With someone at the helm of the organization, the founder was able to go out and build relationships with small and mid-market clients to prove the businesses market value.

2

Strategic Growth

By adding key team members and moving to an area where customers were in high concentration, the organization was compliant, strategic, and in the right place to attract venture capital.

3

People Processes

With a rapidly growing team, and new tech stack, documentation and technical enablement allowed the sales and customer success organization to scale and get up to speed to be productive in their roles in very little time.



Enterprise-level customer experiences



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