ValueLogics.ai
THE ROI AGENT COMPANY

Sarnosites

ROI CASE STUDY · EARNED VALUE REPORT CARD

Metrix Inc. increased sales — and had the numbers to prove it.

A documented ROI retrospection on the GoldPoint / WebROI value-selling methodology.

✓ **Documented · full ROI retrospection**

>1,000%	$3,224,640	4
RETURN ON INVESTMENT	EARNED VALUE · 36 MONTHS	GOVERNED VALUE DRIVERS

Metrix Growth

Metrix Inc., a Customer Relationship Management (CRM) corporation, did something few companies manage in a single year: it grew business, reduced costs, and fattened its bottom line — with the numbers to prove it. By applying the ROI value-selling methodology, Metrix:

- Expanded **new-account business by 19%** with a sales and marketing team working smarter, not harder.
- Reduced **pre-sales expenses by $288,000 annually** by avoiding product demonstrations to unqualified customers.

- Reduced the **average customer discount by 30%** through disciplined value assessment and presentation.

Corporate Overview

Metrix, Inc. (Waukesha, WI) is a leading developer of CRM software. Founded in 1980 on a customer-centric philosophy and a three-time member of the *Inc.* 500, Metrix is a leader in integrated solutions across the service chain worldwide. When Metrix decided to objectively prove the ROI value it generated for existing and prospective customers, it turned to an innovator in ROI analysis: Anthony Sarno.

The Business Issue

Metrix's service-management products offered outstanding value — but feature-function-benefit selling failed to convincingly demonstrate the ROI Metrix generated. In a thinning economy, top executives demanded the payback and ROI for every dollar spent on IT.

VP of Sales Harvey Shovers recognized that CFO-certifiable business cases could differentiate Metrix. But customized ROI studies took up to **60 hours** to produce and pulled salespeople away from selling. Relying on manual work and expensive outside expertise produced "costly, inconsistent, and sometimes frustrating ROI studies," and Metrix could only justify business cases for its largest prospects. Shovers wanted a case in front of *every* prospect, regardless of size.

The ROI Value Sales Solution

The tipping point came when a large prospect's IT department asked Metrix to convey its software's value to the senior executives who approved all IT purchases. Metrix turned to Anthony Sarno and GoldPoint — a methodology and application that builds persuasive, objective, CFO-certifiable business cases from customer-supplied data. The case was completed **in hours, not days**, Metrix won executive approval, and integrated the methodology into its sales process.

Financial Benefits

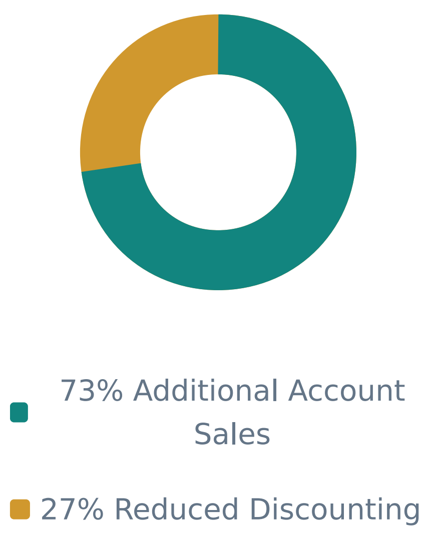
Increased Revenues

New-account sales up 19%

The proof: *Metrix increased new-account sales by 19% — an average* **$522,880 per year**.

Discounting reduced by 30%

Presenting quantified value meant buyers stopped comparing strictly on price, cutting the average discount by more than 30% — an average **$192,000 per year**.



Reduced Costs

Pre-sales expenses cut by $288,000 / year

By allocating costly pre-sales resources only to qualified prospects, the share of closed business coming from demonstrated prospects nearly tripled — avoiding an average **$288,000 each year** *in unnecessary pre-sales cost.*

Business-case time trimmed by 90%

Development time dropped from 60 hours to 6 — a 90% reduction. Now 75% of new prospects receive a business case, versus 10% before, saving an average **$72,000 per year**.

EARNED VALUE REPORT CARD — METRIX

$3,224,640 earned over 36 months · ROI > 1,000%

VALUE DRIVER (THREE-YEAR CASH FLOW)	YEAR 1	YEAR 2	YEAR 3	TOTAL
Additional Account Sales	$522,880	$522,880	$522,880	**$1,568,640**

VALUE DRIVER (THREE-YEAR CASH FLOW)	YEAR 1	YEAR 2	YEAR 3	TOTAL
Pre-Sales — Demonstrations avoided	$288,000	$288,000	$288,000	$864,000
Additional Revenue — Reduced Discounting	$192,000	$192,000	$192,000	$576,000
Sales — Business-Case Creation	$72,000	$72,000	$72,000	$216,000
3-Year Earned Value				**$3,224,640**

Additional Advantages

Credibility & personalization

Senior, marketing, sales, and pre-sales executives agreed the business cases carried the right level of detail, format, and order for executive review — each one customized to the client.

Sellers became consultants

"The ROI step transforms our relationship to a consultative one, and qualifies the prospect while engaging the senior executives who sign off on the deal," said Shovers.

Better forecasting

"When I tell the board we have nine opportunities whose CFOs have received a business case, they now know a vast majority will close," said Shovers.

Better customer service

The methodology helps negotiate financial terms and lets prospects confirm the value of their investment by tracking and measuring results after implementation.

The ROI Method. Published cost-savings and operational-improvement numbers are often suspect — which is why buyers must understand the source and nature of every metric. A full ROI retrospection was performed for Metrix to quantify results and isolate the effects of the methodology, proving a return in excess of 1,000% — the same annualized calculation banks and mutual funds use to report rates of return.

Model every factor. For select companies, we model all factors affected by the software — projecting ROI, payback schedules, and net value over three years across the marketing (WebROI), sales (GoldPoint), and customer-loyalty (ROI Success Story) phases.