



Plan smarter. Adapt faster.

From reactive reporting to proactive leadership with an AI-native FP&A platform

"Una connects users directly to their bowtie results, helping teams become more data-driven in their decision-making process. Visually tracking the full bowtie with Una allows for an easy summary at a quick glance to review revenue results."



Andrew Parry
Lead Advisor & Growth Architect
Winning by Design

What does Una solve?

Una solves the limitations of legacy FP&A tools by embedding AI at the core of the planning process.

Where other systems rely on manual inputs, disconnected data, and backward-looking models, Una uses AI to forecast with incomplete data, adapt instantly to change, and surface insights in real time. They help transform financial planning from reactive reporting to proactive, performance-driving leadership.

Who is Una for?

Una is built for forward-thinking finance teams in companies that need to plan smarter, move faster, and close the gap between strategy and execution. It's ideal for organizations seeking to modernize their planning process, replace static spreadsheets, and empower cross-functional collaboration—regardless of industry.

Common triggers for adopting Una include missed forecasts, reliance on manual processes, planning with disconnected data, rapid growth, business model changes, M&A activity, or the need to replace backward-looking models with AI-powered agility and deeper insight.

What's unique about Una?

Una stands apart as:

AI Native

with intelligence built into every layer of the platform

Revenue-Connected

integrating financial, operational, and GTM data

Execution-Focused

with real-time action-tracking and outcome visibility

Business-Accessible

enabling use beyond finance with embedded BI and collaboration tools

How is Una leveraging AI?

AI isn't a feature—it's the engine. Una uses embedded AI and statistical models to:

- Generate forecasts that adapt continuously—even with messy or missing data
- Let teams ask questions in plain English and get AI-powered answers
- Automate workflows, streamline reporting, and dynamically update plans (without IT intervention)

Key business benefits

Una's Performance Planning provides real business benefits by enabling teams to deliver:



Increased forecast accuracy and agility



Faster, more strategic decision-making



Greater execution accountability

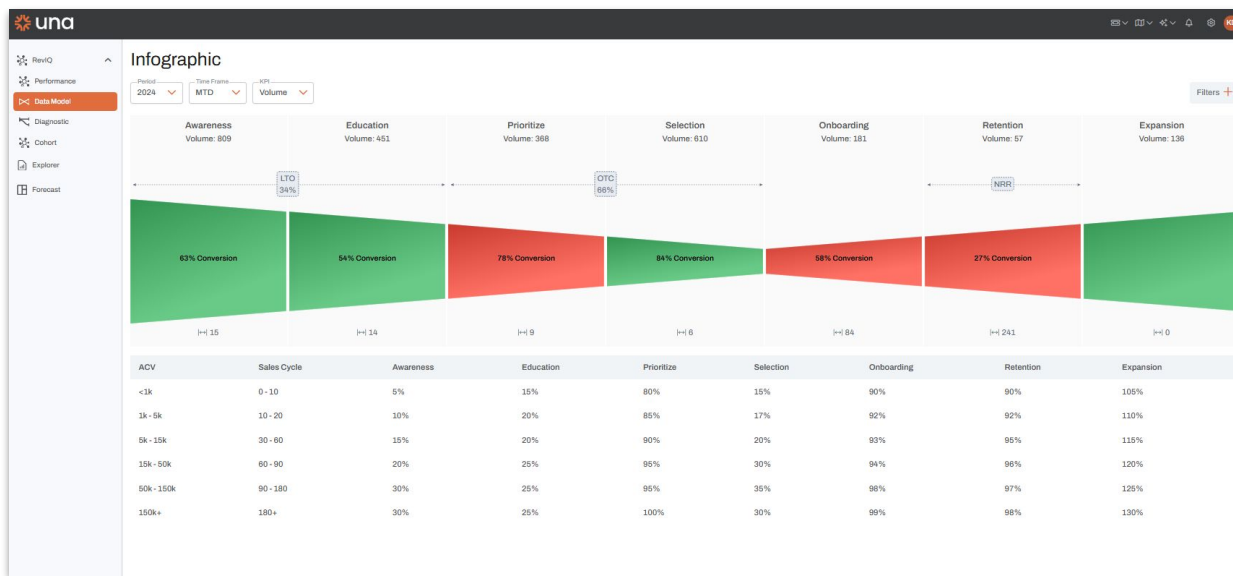


Optimized resource allocation

THE PLATFORM

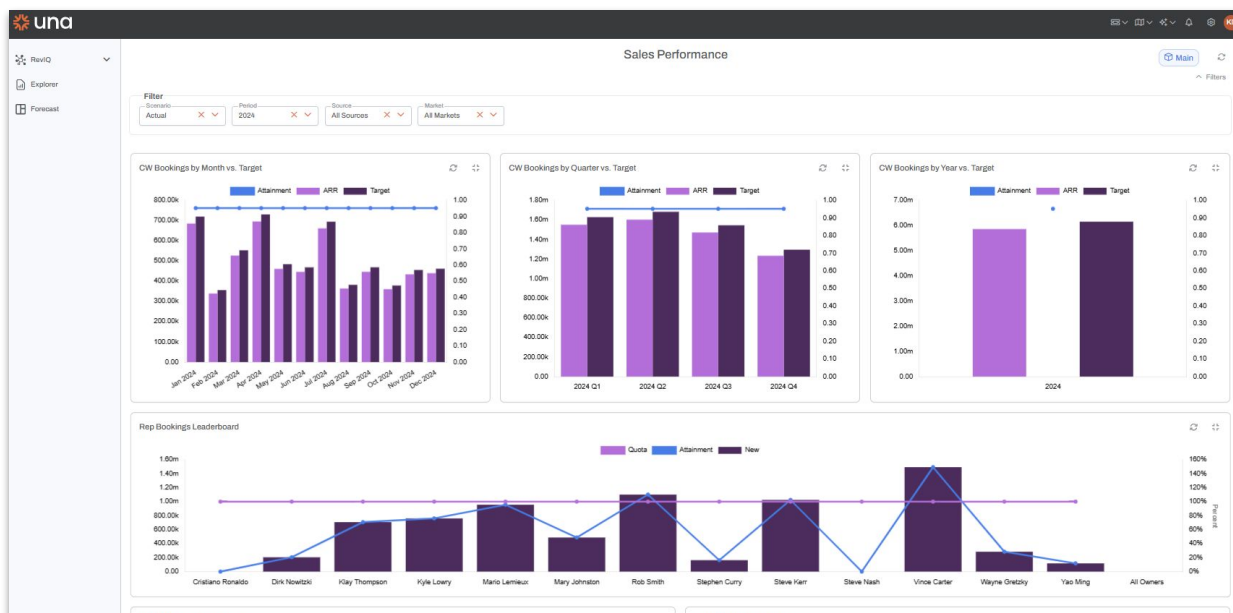
Una's **Performance Planning Platform** moves beyond static, backward-looking tools by connecting your real-time operational data directly to your financial outcomes. This allows finance teams to align with revenue goals, plan resources effectively, and generate AI-powered forecasts that drive the business forward and adapt to changing situations.

Bowtie Diagnostic Report



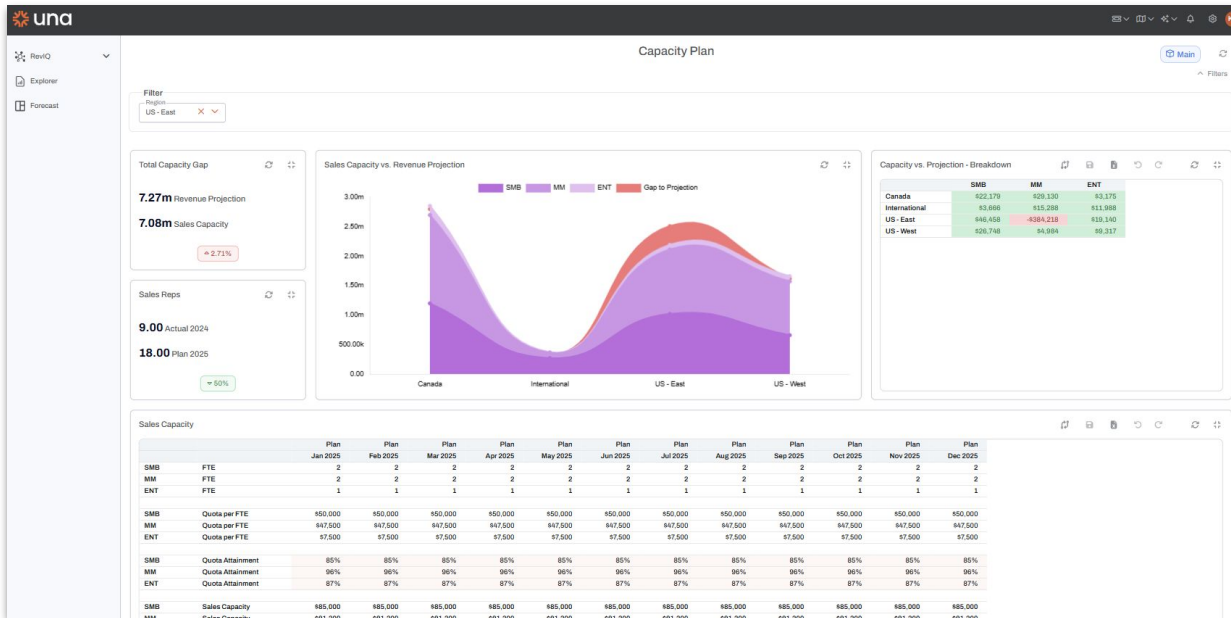
Una connects real-time go-to-market data across the entire customer lifecycle into your financial plans.

Sales Performance



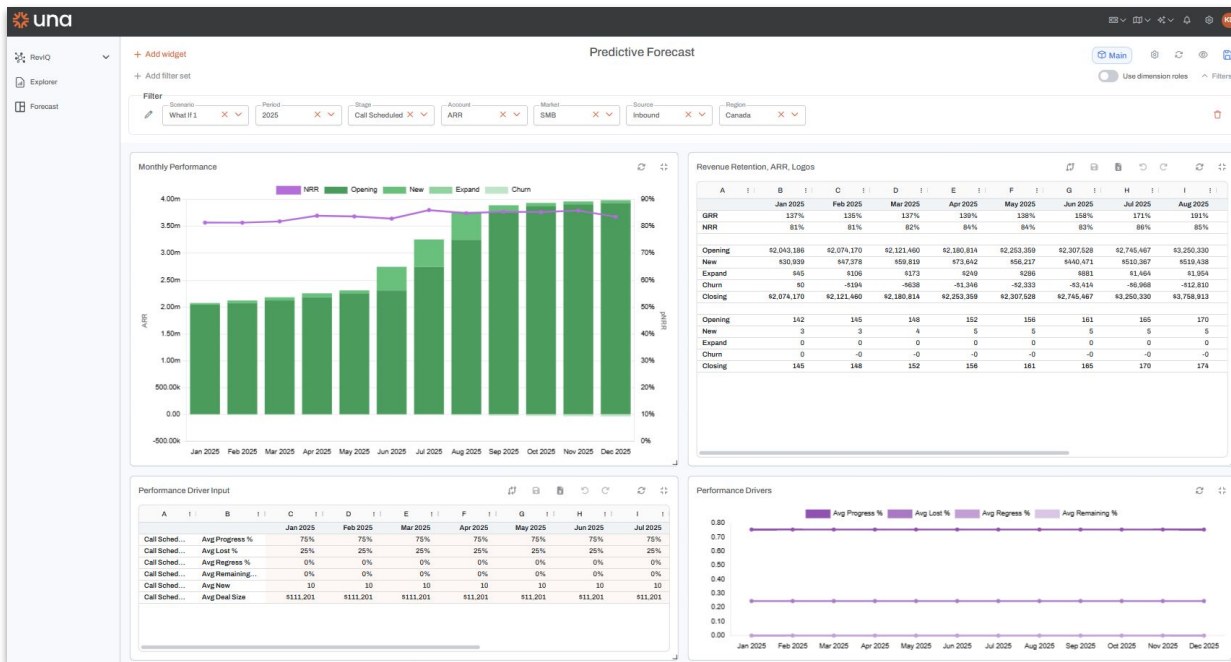
Then, it tracks sales execution against targets with dashboards that align finance and revenue teams.

Capacity Plan



Una proactively models sales capacity to ensure resource allocation is optimized for profitable growth.

Predictive Forecast



Finally, Una uses AI to generate dynamic forecasts that adapt in real time to drive decisions.

From Data Chaos to Clarity



SITUATION

Tim was just weeks into his new role as Let's Grow CRO, leading a 25-person GTM team across Sales, Marketing, and Customer Success. His Netherlands-based SaaS unit was part of a larger conglomerate serving EMEA agriculture companies.

The conglomerate was excited about the potential for recurring revenue but lacked the experience and structure to scale, so Tim needed to quickly diagnose issues and optimize processes to make it happen.

PAIN

His team built Power BI reports trying to stitch together insights from their CRM (Zoho) and ERP (4PS), but the data was fragmented and unreliable. Leadership wanted answers about revenue, churn, and growth strategies that Tim couldn't deliver.

Multiple GTM strategy shifts in the past meant no reliable YoY comparisons. He knew churn was happening but had no idea why—data was a black box. Sales chased every lead rather than using a scalable process, and the CFO couldn't rely on his numbers for forecasting.

Tim recognized the signs: ad-hoc approaches instead of a clear strategy, silos, and very little cross-team orchestration. The parent company was watching—if Tim could transition Let's Grow to recurring revenue, it would set a precedent for the entire group. Failure wasn't an option. He had to get some clarity.

IMPACT

Tim knew they needed a proven, recurring revenue-specific set of frameworks the team could anchor on. And he needed a standardized set of data and tools for monitoring the GTM and knowing where to focus their attention.

He called in revenue planning experts from Una, using their platform to clean up and unify data across Zoho and 4PS. They helped him create a single source of truth aligned to the bowtie data model.

Tim and his team now have a clear view of their entire customer journey with dashboards to make decisions based on real, reliable data instead of scrambling for answers.

Results were dramatic: Their average deal size skyrocketed 450%, they hit more than double their revenue targets, and churn dropped 60% by identifying and addressing the right triggers. Forecasting improved dramatically too—no more zombie deals stuck in Zoho for 60-90 days. Today Let's Grow isn't just outpacing competitors, they're setting the standard for SaaS in their industry.

QUANTIFIABLE IMPACT

2X*Revenue targets***60%***Reduction in churn***450%***Increase in Annual Contract Value*

How the Platform Supports the WbD OS

Know how to course-correct when plans change

WbD lives and breathes the bowtie funnel, but our clients' messy data often slows engagements before they start. Revenue Architects can spend weeks diving into data before any actual diagnostic work can begin. Una fixes that. Their platform connects to Salesforce, HubSpot, or any modern CRM, and then maps every record to WbD's bowtie data model in minutes.

What this means for your team: You get one system that connects GTM teams and finance, provides ready-to-use bowtie metrics (like velocity, leakage, expansion, etc.), and keeps plans, forecasts, and actions aligned—so you can plan smarter and adapt when you need to. Standardized inputs also leverage BenchSights for easier comparison with peers.

Una grounds decisions in the science of predictable revenue growth. Their FP&A platform integrates agile financial planning with revenue intelligence to ensure precise forecasts and optimized resources for scaling companies. This makes Una an ideal partner for CFOs, VPs FP&A, and Finance Directors who need to course-correct throughout their revenue growth journey.

It pairs WbD frameworks with live planning tech so that GTM motions run like a factory production line, improvement areas are identified and measured, and finance is directly tuned into the customer journey. It turns the "science of predictable revenue growth" into day-to-day execution.

The business impact is clear. Teams get faster time-to-insight and confidence that their decisions are grounded in objective data. This means:

Accelerated GTM diagnostics

Live win/loss conversion and expansion metrics cut prep time (by up to 90 %)

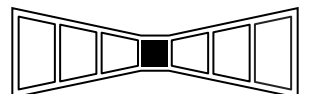
A single source of truth

Sales leaders and teams can benchmark their metrics against the bowtie with a click

Storytelling that drives revenue

Leaders can use clean lifecycle data to show the visible impact of their improvements

"Una brings a new level of sophistication to GTM analytics. No longer is analysis limited to just revenue. With enhanced financial planning and analysis, Una's analytics now bring insight to the CEO, CRO, and CFO, ensuring true strategic alignment." – **Dr. Dan Patterson**, WbD Chief Innovation Officer



The WbD Verdict — Una

Quick take: Una is an AI-native FP&A platform that connects real-time GTM data to financial outcomes, enabling rolling re-forecasting, capacity planning, and bowtie-aware performance reviews. It's strongest when finance needs to lead—linking strategy with execution and turning messy inputs into decisions your CFO can defend.

Best for: Mid-market to enterprise teams that want dynamic planning and resource-optimized growth, not just reporting.

Overall rating: ★★★★★ 8.6/10

Why this score: Holistic P&L planning with multi-year modeling, strong CRM connections, and scenario planning; excellent alignment between finance and GTM. Roadmap includes support for the WbD Common Data Schema (single source of truth platform for GTMDs and CxO Growth Guidance). Points off for no Monte Carlo.

PROS

- **Finance-first, revenue-connected planning:** ties GTM data to budgets and forecasts; supports top-down + bottom-up planning along with live course-correct.
- **Bowtie Diagnostic Report and Sales Performance dashboards** align CFO/CRO on the same facts; display lifecycle-to-financial linkage.
- **Capacity Plan and Predictive Forecast (AI-powered)** enable rolling re-forecasting and resource optimization; see page 4 screenshots.
- **Embedded AI** for forecasting with incomplete data and natural-language Q&A; designed for business users beyond finance.
- **Real-world impact:** Let's Grow saw +450% ACV, revenue >2x target, churn -60% after standardizing data and aligning plans to bowtie.

CONS

- **No Monte Carlo simulation;** scenario modeling exists but stochastic risk modeling is absent.
- **Finance-led orientation:** revenue teams wanting prescriptive, SLA-level execution tooling may prefer a RevOps OS (e.g., Vasco).

WHO IT'S FOR

- **\$30M–\$3B revenue orgs (Saas and non-Saas)** where CFO/VP FP&A must continuously re-plan with GTM signals
- **Companies replacing static spreadsheets** with AI-native, business-accessible planning and embedded BI

WHO IT'S NOT FOR

- **Early-stage teams prioritizing RevOps guidance** (activity SLAs, prescriptive alerts) over finance-grade planning
- Teams that require **advanced simulation** (e.g., Monte Carlo); consider TigerEye for that use case



WBD APPROVED

Recognized as a strong fit when finance needs a dynamic, GTM-aware planning system that can re-forecast quickly and align resources to growth.

CORE FEATURES WE VERIFIED

Bowtie Diagnostic Report, Sales Performance, Capacity Plan, Predictive Forecast; connects CRM data to financial plans and adapts in real time
Top-down + bottom-up planning, multi-year modeling, scenario planning, and **CRM push/pull.**

PRICING SNAPSHOT


- [Contact Una](#) for packaging and pricing

HOW IT COMPARES (HIGH-LEVEL)

- **Una vs. Vasco:** Una leads on holistic FP&A + rolling re-forecasting; Vasco leads on RevOps OS with data hygiene and guided execution
- **Una vs. TigerEye:** Una is a planning engine connected to finance; TigerEye has AI BI + Monte Carlo for strategic forecasting
- **Una vs. scaleMatters:** Una is software for planning; scaleMatters is analytics-as-a-service for GTM data

HOW WE SCORED:

Category	Weight	Score
Data hygiene & integrity	30%	8.5
Planning & capacity modeling	20%	9.5
Guided execution & SLAs	20%	8.1
AI guidance (assist, insights)	15%	8.1
Ecosystem/integrations	10%	8.8
Governance & reporting	5%	9.0
Overall		8.6/10

To learn more about  **una**

Visit their [website](#) or [book a demo](#).



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