



From disconnected data to clear decisions

How to get your systems working for you

HOSTED BY

Jason Rainbird

Founder & MD · Flowbird Ltd

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Social Entrepreneur, Founder & Mentor

Grab the handout, follow along & take notes

ONE-PAGE COMPANION

Download the webinar handout

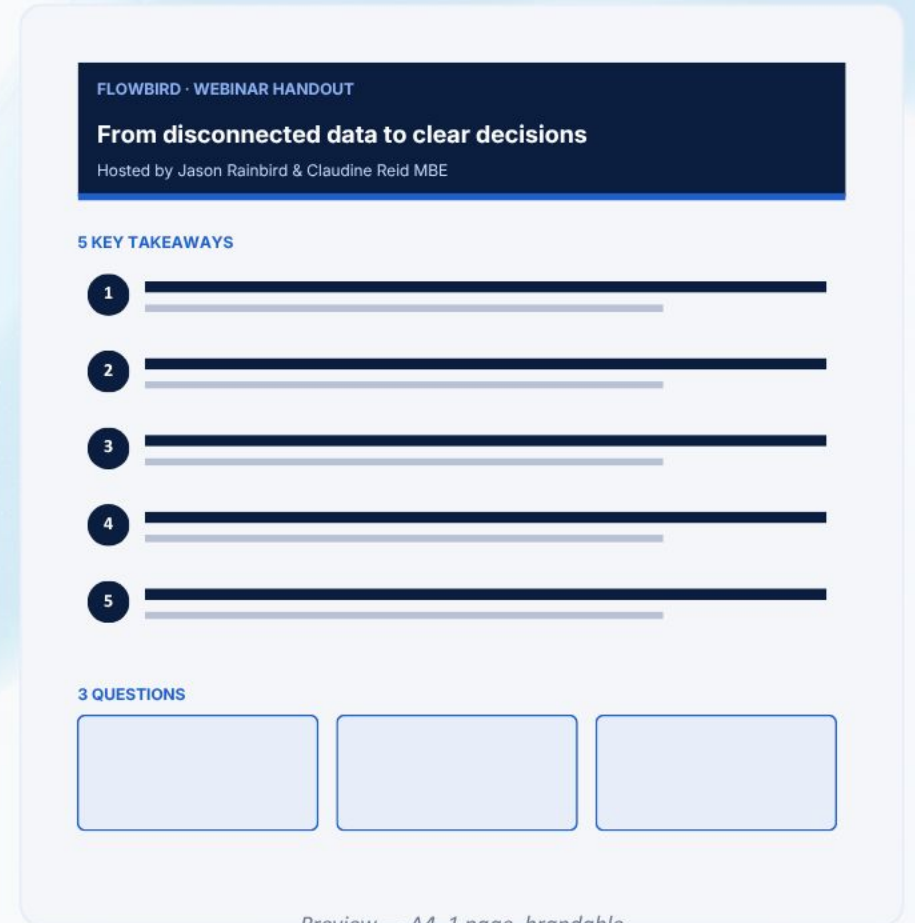
A single-page PDF with the 5 key takeaways and the 3 questions we'll work through together. Print it, keep it open on a second screen, or annotate it as we go.

WHAT'S INSIDE

- 5 key takeaways with space to write your own note for each
- 3 self-assessment questions on data, foundations & mindset
- "My next three actions" - what you'll commit to after the call

DOWNLOAD AT

flowbird.co.uk/webinar-handout



Preview — A4, 1 page, brandable

Your hosts today



Jason Rainbird

Founder & Managing Director

Flowbird Ltd



Helping growing teams turn CRM, automation and data into a connected revenue system they can actually trust.

CRM & Automation

Revenue Systems

Flowbird Ltd



Claudine Reid MBE

Social Entrepreneur, Founder & Mentor

PJ's Community Service



Helping leaders and organisations turn vision into practical action - drawing on 30+ years across business, leadership and community development.

Lloyds BBAC (Chair)

Small Business Charter

Atlanta Black Chamber

Most teams don't have a CRM problem.

They have a systems problem.

Tools get added. Processes shift. What started simple slowly becomes harder to trust - and harder to manage.

- Don't fully trust what their CRM or reports are telling them
- Struggle to get a clear picture of pipeline, performance or customer activity
- Feel disconnected from what's really happening across sales and ops
- Lack confidence in their systems to support real growth

If your systems can't tell you the truth, you can't make confident decisions.

What we'll cover today

01

Why clarity comes first

Before any tool, any platform, any automation.

02

How to assess what you've got

Find the gaps in systems, processes and data.

03

Foundations before tools

What needs to be true before you scale or buy more.

04

From data to decisions

Faster, clearer, more confident calls - every week.

05

A platform for growth

Why this approach compounds over the long term.

Why clarity should come before implementation



New software does not fix unclear thinking. It scales it.

~ Jason Rainbird, Flowbird

Clarity is the work that pays for itself.

Decisions you can defend

Built on numbers everyone agrees on.

Tools chosen for a reason

Not because a competitor uses them.

Teams pulling the same way

Same definitions, same pipeline, same view.

Implementation that sticks

Because it solves a problem people felt.

How to identify gaps holding back better decisions

Systems

List every tool that touches a customer. Most teams find 2–3 they forgot they had.

Processes

Walk a deal end-to-end. Where do people use spreadsheets, email or memory?

Data

Pick one KPI. Ask 3 people how it's calculated. Different answers = a gap.

Decisions

What calls do you avoid making because you don't trust the numbers?

Finding the gap nobody could see

THE SITUATION

A B2B services client

Sales said "we're growing." Finance said "cash is tight." Ops said "we're drowning." All three were right - and the CRM, accounting tool and project system each told a different story.

The pipeline report was based on stages no one had agreed on for 18 months.

How we found it

01 Mapped every system

Drew the actual flow of a deal - not the one in the handbook.

02 Interviewed each function

Asked the same 5 questions to sales, ops and finance.

03 Compared definitions

"Qualified lead" meant 4 different things across the business.

04 Surfaced the gap

Decisions were being made on data nobody fully owned.

What strong foundations look like before new tools

If these aren't true, more software won't help.

01

Shared language

Lead, opportunity, customer, churn - defined once, used everywhere.

02

Documented process

A real, current map of how work moves through the business.

03

Clean, owned data

One source of truth per object. A name against every field.

04

Honest reporting

Numbers leadership trusts enough to act on this week.

05

Tooling discipline

A reason for every system. A plan for every integration.

Foundations before scaling

BEFORE

A growing professional services firm

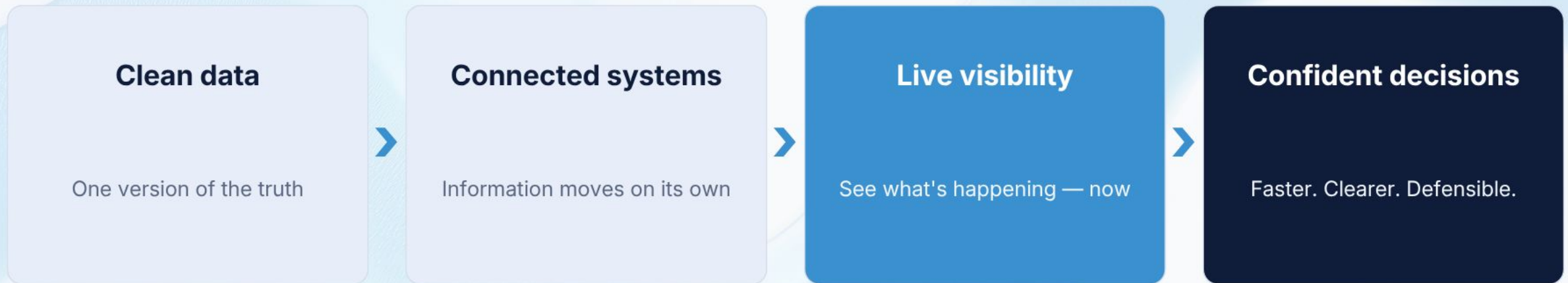
- 3 CRMs in active use across departments
- Pipeline reported in a spreadsheet, rebuilt monthly
- Onboarding handover happened over email
- Leadership made forecast calls on gut feel

AFTER

Foundations laid - then and only then, new tools.

- 1 CRM, agreed definitions, owned by sales ops
- Live pipeline dashboard, refreshed automatically
- Automated handover the moment a deal is won
- Forecasting based on data leadership trusts

Better processes + better data = better decisions



What changes for the team

Faster

Decisions that took weeks now happen in the same meeting.

Clearer

Numbers everyone agrees with... no more debate before the work.

More confident

Leadership willing to commit, because the data backs them.

From weekly guesswork to live clarity

BEFORE

4 days

to compile a weekly pipeline report - manually



AFTER

Live

dashboard refreshed automatically every hour

What it actually unlocked

Monday meetings shifted

Sales coaching got specific

The forecast became useful

From "what happened?" to "what are we doing about it?"

Managers could see exactly where deals were stalling.

Leadership stopped hedging and started planning.

The change isn't technical. It's cultural.

LEADERSHIP

From "buy a tool" to "own the system"

- Data is an asset, not an IT problem
- Process is the strategy
- Slow down to speed up
- Sponsor the work - visibly

EMPLOYEES

From "my spreadsheet" to "our system"

- Trust the process - and challenge it
- Enter data as if it matters
- Question "how we've always done it"
- Own the part you control

CLAUDINE'S LENS

Social-enterprise leadership

EXAMPLE

At PJ's Community Service, frontline staff saw the same client falling through gaps across three programmes. Leadership reframed it: not a reporting issue - a trust issue. They co-designed one shared intake with the team. Drop-offs fell, and ownership moved from "head office" to "our service."

"Transformation isn't a system upgrade - it's a leadership decision to trust your people with better information."

~ Claudine Reid MBE

HOW DO YOU GET THE MINDSET?

Pick one painful decision. Fix the data and process behind it. Let the win do the talking... then repeat.

Why this builds a stronger platform for growth

FOUNDATION ↑ COMPOUNDING

Compounding advantage

every quarter, not every reset

Scale

without chaos

Speed

of decision-making

Trust

in your numbers

The pay-off

Most growth problems aren't growth problems.

They're clarity problems showing up at scale.

Fix the clarity, and growth gets easier... not harder.

Three questions to spark the conversation

DATA & GAPS

1

Where in your business is a decision being made today on data you don't fully trust, and what's it costing you?

Think: forecasts, pipeline, churn signals, capacity planning.

FOUNDATIONS

2

If you removed every tool tomorrow, would your core process still hold together, or is the tool the process?

If the tool IS the process, the foundation isn't ready for scale.

MINDSET

3

Who in your team needs to go first - leadership sponsoring the change, or employees showing it works? How do you bridge the two?

Both have to move. The question is which lever you pull first.

Drop your answers in the chat. Jason and Claudine will work through them live.



Let's turn your data into your next decision.

Book a 30-minute Discovery Call with Jason. No slide deck. No sales pitch. Just an honest look at where your systems are leaking clarity... and the two or three changes that would unlock the biggest decision you're stuck on.

BOOK YOUR DISCOVERY [CALL](#)

flowbird.co.uk/book

30 minutes · Free · No prep needed

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