

Case Study 1

NOVASPARK TECHNOLOGIES

SaaS Product Company

SAAS / HR TECH

AUSTIN, TX

180 EMPLOYEES








LIO · INZO · SIGI

NovaSpark Technologies Is A Fast-Growing SaaS Company Founded In 2018 That Provides Cloud-Based HR Software To Over 2,400 Mid-Market U.S. Businesses. By 2023, It Expanded From 30 To 180 Employees, But Its Internal Processes Struggled To Keep Up With This Rapid Growth.



The Challenge: Growing Pains at Scale

Prior To Adopting **WorksBuddy**, **NovaSpark's** Operational Infrastructure Was A Patchwork Of Disconnected Tools Project Tracking Happened In One Platform, Billing In Another, And Performance Reporting Barely Happened At All. Here's What That Looked Like In Practice:

 Pain Area	 Impact Before WorksBuddy
 Project Coordination	Engineering, product, and customer success teams used 3 different tools . Cross-functional projects had no single source of truth, causing missed deadlines and duplicated work.
 Invoicing & Billing	Finance manually processed client invoices in spreadsheets. Payment follow-up took 2-3 hours per week per account manager. Average invoice-to-payment cycle: 38 days .
 Reporting & Insights	Monthly performance reports required 6-8 hours of manual data aggregation across tools. Executive dashboards were always 2 weeks behind actual company performance.
 Onboarding New Hires	No standardized onboarding workflow. New employees took 3-4 weeks to become fully productive, with critical steps often skipped or duplicated.
 Resource Allocation	Leadership had no real-time visibility into team capacity. Engineers were frequently over-allocated, leading to burnout and missed sprint commitments.

"We Were A SaaS Company That Built Software To Make HR Easier For Others And Yet, Our Own Internal Operations Were Held Together With Sticky Notes And Shared Spreadsheets. Something Had To Change."

Marcus Delgado,
VP Of Operations, NovaSpark Technologies

The WorksBuddy Solution

NovaSpark Partnered With WorksBuddy In Q1 2024 For A Phased Implementation Of All Three Products: LIO, INZO, And SIGI. The Goal Was Not Simply To Replace Existing Tools It Was To Build An Integrated Operational Foundation That Could Scale With The Company.

Phase 1 – Deploying Lio: Unified Workflow Automation (Weeks 1-4)

Lio DK Denise K. Ops Director

[View Implementation Plan](#)

PHASE 1

Deploying Lio: Unified Workflow Automation

Weeks 1-4

WorksBuddy's implementation team worked directly with NovaSpark's department heads to map existing workflows into Lio's intelligent automation engine.

Implementation Progress

25%
Phase 1 of 4

- Overview
- Projects
- Automation
- Workflows
- Reports
- People
- Settings

Department-Specific Workspaces

Created department-specific workspaces for Engineering, Product, Customer Success, and Sales with custom task templates and automated status flows.

Department	Status
EN Engineering	Active
PR Product	Active
CS Customer Success	Active
SA Sales	Active

Sprint Planning Board

Built a company-wide Sprint Planning Board that gave cross-functional teams a shared view of all active projects, owners, deadlines, and dependencies.

Sprint Planning Board

- In Progress 12
- In Review 5
- Completed 8

Project	Owner	Start
Mobile App Redesign	[Avatar]	Sep 12
API Integration Phase 2	[Avatar]	Sep 15
Dashboard Analytics	[Avatar]	Sep 10

[+ New Project](#)

Automated New Hire Onboarding

Automated new hire onboarding checklists: each new employee automatically receives a sequenced 30-day task plan on their first day, triggered by their HRIS entry.

Onboarding Timeline (30 Days)

Day	Task	Status
Day 1	Company & Role Orientation	Completed
Day 7	Tools & Access Setup	Completed
Day 15	Training & Documentation	Pending
Day 30	Review & Feedback	Pending

Engineer Capacity Dashboards

Set up capacity dashboards showing real-time engineer availability — updated automatically as tasks are assigned and completed.

Engineer Capacity

72% Available

Category	Percentage
Available	72%
Busy	20%
Overbooked	8%

Updated in real-time

Phase 2 – Deploying Inzo: Smart Invoicing & Financial Ops (Weeks 3–6)

The screenshot displays the Inzo dashboard interface. At the top left, the 'Inzo' logo is visible. The top right corner shows a notification bell with '3' alerts, a user profile for 'Denise K. Ops Director', and a 'View Implementation Plan' button. A left-hand navigation menu includes 'Overview', 'Projects', 'Automation', 'Workflows', 'Reports', 'People', and 'Settings'. The main content area is titled 'PHASE 2 Deploying Inzo: Smart Invoicing & Financial Ops' for 'Weeks 3–6'. It features a central graphic of the 'inzo' logo on a pedestal, surrounded by icons for a document with a dollar sign, a bar chart, a wallet, and a checkmark. Below this, four feature cards are presented: 'Automated Invoice Generation' (2,400+ SaaS Clients), 'Smart Payment Reminders' (7, 14, and 30 days), 'Integrated with Payment Gateway & CRM' (showing inzo, stripe, and Salesforce integration), and 'Expense Approval Workflows' (1,250+ Expenses Processed). A bottom-left widget shows 'Implementation Progress' at 50% for 'Phase 2 of 4 Weeks 3–6'.

Inzo

DK Denise K. Ops Director

View Implementation Plan

PHASE 2

Deploying Inzo: Smart Invoicing & Financial Ops

Weeks 3–6

Inzo replaced NovaSpark's manual invoicing process entirely. The finance team was live on the platform within 10 business days.

Implementation Progress

50%

Phase 2 of 4 Weeks 3–6

Automated Invoice Generation

Configured automated recurring invoice generation for all 2,400+ SaaS clients based on subscription tier and billing cycle.

Invoices Automated

2,400+ SaaS Clients

Smart Payment Reminders

Set up smart payment reminders — Inzo automatically sends personalized follow-up sequences at 7, 14, and 30 days past due, reducing the need for manual collections outreach.

Overdue Follow-ups Automated

7 Days 14 Days 30 Days

Integrated with Payment Gateway & CRM

Integrated Inzo with NovaSpark's existing payment gateway and CRM, giving account managers real-time visibility into each client's billing status from within their existing workflow.

Billing Status Visibility

inzo ↔ stripe ↔ Salesforce

Real-time Sync Enabled

Expense Approval Workflows

Built expense approval workflows that routed employee expense submissions through automated manager approval chains, with GL coding applied automatically.

Expenses Processed

1,250+ This Month

Phase 3 – Deploying Sigi: AI Business Intelligence (Weeks 5–8)

Sigi

Denise K. Ops Director


PHASE 3

Deploying Sigi: AI Business Intelligence

Weeks 5–8

Sigi was configured to pull data from Lio, Inzo, and NovaSpark's product analytics platform to create unified, real-time executive reporting.

View Implementation Plan



Automated Weekly Performance Digests

Built automated weekly performance digests delivered to department heads every Monday at 8 AM — no manual compilation required.

Every Monday at 8:00 AM Active

Executive Dashboard

Created an executive dashboard showing live KPIs across revenue, team velocity, churn risk, and customer health scores — updated in real time.

[View Dashboard](#)

Predictive Analytics for Risk Detection

Deployed Sigi's predictive analytics engine to flag at-risk client accounts based on usage patterns and payment behavior, giving customer success teams a 14-day head start on retention conversations.

Risk Analysis Active 14-Day Advantage

Natural-Language Query Capability

Configured natural-language query capability so any team lead could ask Sigi questions like "How many tickets were resolved last week?" and receive instant answers — no SQL required.

[Try Query](#)

Implementation Progress

75%

Phase 3 of 4

Weeks 5–8

Executive KPI Overview

Last 30 Days

KPI	Value	Change vs. Last 30 Days
Total Revenue	\$12.48M	↑ 18.6%
Team Velocity	85%	↑ 12.4%
Churn Risk	2.7%	↓ 15.3%
Customer Health Score	91	↑ 8.7%

At-Risk Accounts

View All

Account	Risk Level	Score
TechNova Inc.	High Risk	85%
DataFlow Systems	High Risk	72%
CloudScale LLC	Medium Risk	58%
PixelPerfect Co.	Medium Risk	46%

Sigi Query

How many tickets were resolved last week?

10:24 AM

Last week, 1,247 tickets were resolved.

10:24 AM







Ask Sigi anything...

"Sigi's Weekly Digest Alone Saved Our Leadership Team Roughly 3 Hours Every Monday. We Stopped Talking About What The Data Might Say And Started Making Decisions."

Priya Sundaram, Chief Operating Officer, NovaSpark Technologies

Strategy & Time/Cost Savings

WorksBuddy's Implementation Followed A 'Consolidate, Automate, Illuminate' Framework Specifically Designed For Scaling SaaS Companies:

Phase	Strategy	Monthly Time Saved
 Consolidate	Replaced 7 siloed tools with Lio, Inzo & Sigi as one unified platform — single login, single source of truth across all departments.	 ~64 hours/month (tool-switching, manual syncing)
 Automate	Automated invoice generation, payment reminders, onboarding workflows, sprint assignments, and expense approvals — eliminating repetitive manual tasks.	 ~110 hours/month (finance + ops automation)
 Illuminate	Deployed Sigi's real-time dashboards and predictive alerts to surface decisions before they became crises — turning reactive management into proactive strategy.	 ~48 hours/month (reporting + manual analysis)

Total Estimated Time Saved Per Month: **222+ Hours**. At NovaSpark's Average Fully-Loaded Cost Of \$78/Hour For Operations Staff, This Represents An Estimated Monthly Savings Of Over \$17,300 Or More Than \$207,000 Per Year.

Key Results & Performance Improvements



68%

Reduction in
Manual Reporting Time



34%

Faster
Invoice-to-Payment Cycle
























3.1x

Faster Onboarding
Productivity



\$207K

Estimated Annual
Cost Savings

 WorksBuddy Tool	 Metric	 Result
 Lio	Sprint delivery rate (on-time)	 54% → 89% within 90 days
 Lio	New hire onboarding time to productivity	 3.5 weeks → 11 days
 Lio	Cross-team project visibility score (internal survey)	 41% → 94% satisfaction
 Inzo	Average invoice-to-payment cycle	 38 days → 25 days
 Inzo	Finance team hours on billing/month	 87 hours → 22 hours
 Inzo	Overdue invoices (90+ days)	 Down 71% in 6 months
 Sigi	Monthly reporting compilation time	 6–8 hrs → 0 hrs (fully automated)
 Sigi	At-risk account identification lead time	 0 days → 14-day early warning
 Sigi	Leadership decision-making confidence (survey)	 Improved by 88%

Overall Business Impact

After Six Months On WorksBuddy, NovaSpark Technologies Wasn't Just More Efficient It Was Fundamentally Better Positioned To Scale. The Operational Foundation Built With LIO, INZO, And SIGI Gave Leadership The Clarity To Make Faster, More Confident Decisions, Gave Teams The Structure To Deliver Consistently, And Gave Finance The Tools To Ensure Cash Flow Remained Healthy Through The Company's Continued Growth.

"WorksBuddy Didn't Just Give Us Better Tools. It Gave Us The Operational Clarity To Actually Run Our Business Not Just React To It. LIO, INZO, And SIGI Have Become As Central To NovaSpark As Our Own Product."

Marcus Delgado, VP Of Operations, NovaSpark Technologies

- **NovaSpark** Reduced Operational Headcount Needs By 1.5 FTE Equivalents Through Automation Savings Reinvested Into Product Development.
- Customer Churn Dropped 18% In Q3 2024, Directly Attributed To SIGI's At-Risk Account Alerts Enabling Proactive Customer Success Outreach.
- **NovaSpark's** Series B Fundraising Deck Featured **WorksBuddy** Operational Metrics As Evidence Of Mature, Scalable Internal Infrastructure Cited Positively By Investors.
- Employee Satisfaction Scores Related To Internal Tools And Processes Improved From 3.1/5 To 4.6/5 In The Company's Bi-Annual Engagement Survey.

