

Casella Doesn't Have a CRM Problem. It Has a Scale Opportunity.

PREPARED FOR CHRISTOPHER RAINS · CHIEF REVENUE OFFICER · CASELLA WASTE SYSTEMS

Turning acquisition scale, Lead-to-Cash and Dynamics 365 into measurable commercial outcomes.

~\$5.25M

25 basis points of improved commercial execution at ~\$2.1B revenue

Illustrative scenario — not a forecast

Casella Is Already Building the Pieces of a Commercial Operating System

Based on Casella's public strategy, disclosures and current hiring signals

80+

acquisitions completed since 2018,
~\$2B deployed

\$1B+

of acquired annual revenue added

~\$2.1B

2026 revenue guidance, ~16.9%
Q2 growth

AND, IN PARALLEL

New CRO owning Sales, Marketing and
Customer Care

Enterprise Lead-to-Cash initiative, rollout
through 2027

Multi-year technology modernization
strategy

Dynamics 365 and business-systems
standardization

RevOps, Sales Ops and pricing roles open
now

Customer Experience leadership and
analyst roles open now

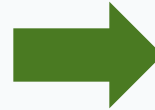
Our hypothesis: these are not isolated hiring needs — they are the components of one commercial operating system.

Systems Integration Is Not Commercial Integration

The same acquisition can be fully integrated technically and still be commercially invisible

SYSTEMS INTEGRATION

- Acquisition closes
- Accounts loaded into billing and operations
- Systems connected, data migrated
- Revenue rolls up in the monthly report



COMMERCIAL INTEGRATION

- Customers, contracts and renewal dates visible
- Pricing normalized to Casella policy
- Retention risk scored from day one
- Sellers assigned, cross-sell quantified

How quickly does acquired revenue become fully visible, actionable and optimized as Casella revenue?

We would propose a repeatable D365 Acquisition Integration Playbook so the answer is measured in days, not quarters.

At Casella's Scale, Small Commercial Improvements Become Material Outcomes

Four opportunity hypotheses we would validate in the first 30 days — illustrative scenarios, not forecasts

PRICE REALIZATION

Casella already prices with discipline. The opportunity is tighter connection between CRM, pricing governance, contracts, renewals, exceptions and seller actions.

10 bps $\approx$ \$2.1M · 25 bps $\approx$ \$5.25M · 50 bps $\approx$ \$10.5M

CUSTOMER RETENTION

Acquisitions, price changes and system migrations create transition risk. Score customers where several risk signals appear at the same time.

0.25% protected $\approx$ \$5.25M · 0.50% $\approx$ \$10.5M · 1.00% $\approx$ \$21M

ACQUISITION INTEGRATION

Compress the time between deal close and full commercial visibility — pricing, renewals, risk and ownership — across ~\$165M of 2026 acquired revenue.

Value compounds across every future acquisition

CUSTOMER EXPANSION

Next Best Casella Solution across collection, disposal, recycling, organics and Resource Solutions, ranked for each customer.

Quantified cross-sell recommendations delivered to sellers

We are not claiming this revenue is being lost today. The objective of the first 30 days is to determine whether the real opportunity is \$2M, \$5M, \$10M or more.

The Opportunity Is to Shorten the Distance Between Signal and Action

Reporting is not the end state — insight only creates value when it reaches a decision

TODAY'S PATH — REPORTING



FUTURE COMMERCIAL OPERATING MODEL



WHAT THIS SOUNDS LIKE INSIDE CASELLA

"37 accounts have pricing exceptions outside policy."

"22 collection customers match the profile of Resource Solutions buyers."

"14 acquired customers have renewals inside 90 days and open service issues."

"Eight strategic opportunities have stalled with no next action."

Dynamics 365, Power Platform, AI agents and Vibe365 appear here as enablers — the competitive advantage is not seeing the problem faster, it is acting on it faster.

One Commercial Operating View Across Sales, Marketing and Customer Care

A CRO Command Center built to drive decisions, not to report activity

CRO COMMAND CENTER

REVENUE

New business
Expansion
Renewals
Price realization
Revenue at risk

CUSTOMER

Retention
Churn risk
Escalations
Customer health
Service performance

SALES

Pipeline coverage
Conversion
Sales cycle
Forecast quality
Next action

ACQUISITIONS

Migrated customers
Revenue integrated
Price normalization
Retention
Cross-sell uptake

EXECUTION

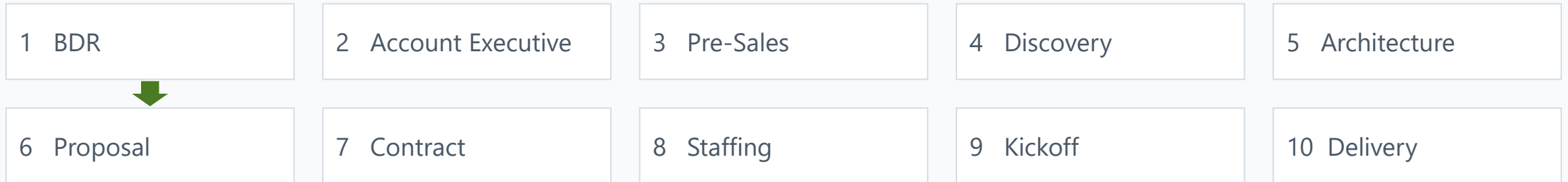
CRM adoption
Data quality
Process compliance
Open decisions
Adoption by region

Every measure carries an owner, a threshold and a next action — signals route to people, not to a report.

The First Advantage Is Time

Both models can deliver quality work — they mobilize at very different speeds

TRADITIONAL CONSULTING MOBILIZATION — STEPS 1 TO 10, LEFT TO RIGHT



AGILIDY · JASON WICKMAN



Why the traditional model takes longer is structural, not cultural: resource scheduling, utilization management, multiple commercial layers, formal discovery and staffing. Sequencing is illustrative and varies by firm.

Agilidy is optimized differently: a small number of clients, direct executive access, one senior owner accountable for outcomes, and specialist expertise added only when the work requires it.

Casella could be seeing results before a traditional engagement has finished mobilizing.

Start Small. Find the Value. Prove It. Then Scale.

Casella Commercial Acceleration Program — a focused 90-day executive sprint turning Lead-to-Cash into measurable revenue outcomes

DAYS 1–30

Find the Money

Jason personally leads. Map the commercial Lead-to-Cash process. Interview Sales, Marketing, Customer Care, RevOps, Finance and IT. Baseline metrics, pricing exceptions, retention risk, acquisition integration, pipeline and cross-sell.

GATE: Top 3 quantified commercial opportunities

DAYS 31–60

Build the Operating Model

Focus only on the highest-value opportunities: CRO Command Center, KPI framework, standardized lifecycle, acquisition integration playbook, pricing governance, customer-risk model, AI-assisted workflows. Vibe365 accelerates D365 work.

GATE: Operating model and 2–3 use cases selected

DAYS 61–90

Prove the Outcome

Deploy the prioritized use cases and measure actual results: baseline vs. outcome, adoption, business owner, ongoing measurement. Jason also assists with recruiting the permanent D365 / Sales Operations team.

GATE: Measured result and a decision to scale

Each phase ends in an explicit decision gate — Casella can stop, adjust or scale with full information.

One Accountable Leader. Expertise Only When Needed.

Jason owns the outcome. Specialists support the outcome — added only when the work requires them.



WHAT JASON PERSONALLY DOES

Works with executive leadership · identifies measurable outcomes · sets priorities · builds the roadmap · drives decisions · coordinates execution · measures results · recruits the permanent D365 / Sales Operations team

25+ years Microsoft CRM / Dynamics 365 · former Microsoft, helped bring D365 for Sales to market · sales leadership · technical foundation · AI and Vibe365

Let's Determine Whether the Opportunity Is \$2M, \$5M or \$10M+

The 90-Day Casella Commercial Acceleration Program

WHAT IS INCLUDED

- Executive program ownership by Jason personally
- Business-outcome baseline across Lead-to-Cash
- Top 3 quantified commercial opportunities
- 2–3 prioritized use cases deployed and measured
- Dynamics 365, AI and Vibe365 acceleration
- Specialist resources only when ROI justifies them
- Recruiting support for the permanent D365 / Sales Ops team

Don't replace Casella's hiring plan. Accelerate it — produce results while building the permanent team that will sustain them.

STARTING AS LOW AS

\$10K

per month · 3-month initial commitment

Low commitment. Senior accountability. Immediate start. No large consulting team to mobilize, and knowledge transferred into Casella as the work proceeds.

NEXT STEP

30-minute executive working session