

THE ATLAS TECH STORY

Session Format Interactive Roundtable	Duration 60 Minutes	Track FP&A Leadership
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REFERENCE | JIM ROHN'S FOUR KEY MOTIVATORS

The Motivational Framework: Jim Rohn

Jim Rohn, mentor to Tony Robbins, Mark Victor Hansen, and an entire generation of business thinkers spent decades studying what actually makes people move. Not what they say motivates them. What actually makes them get up when it is hard, push through when recognition is absent, and choose excellence over comfort.

His conclusion, drawn from years of research and direct observation: motivation is never truly internal in isolation. The most powerful motivators are relational. They connect a person's effort to other people. Rohn identified four primary drivers that, when present, create unstoppable commitment. When absent, they create quiet, invisible withdrawal.

This case study is built entirely on Rohn's framework. Every character, every team dynamic, and every scoring card is grounded in these four motivators:

#	Motivator	What Rohn Says
1	Recognition from Peers	The desire for the respect of the person beside you — your teammate, your colleague, the one who sees your actual work. Rohn observed that soldiers in combat are not motivated by medals or patriotism but by the simple, powerful wish to not let down the person fighting next to them. This is the most immediate, day-to-day motivator on any high-functioning team.
2	Recognition from Respected Experts / Mentors	The approval of someone whose judgment you genuinely value — a leader, a mentor, an authority whose respect you desperately want to earn. Rohn described this as an internalized voice that continues to guide you even when the mentor is not in the room. For finance professionals, this is often the CFO, a senior leader, or a respected external advisor.
3	Family — Who Are You Doing This For	The deepest, most enduring motivator. Rohn recounts a young man with tears in his eyes explaining that he needed \$250K a year for the next decade to take his family on a year-long trip around the world. That specificity — that face, that promise, that person — makes obstacles irrelevant. For your team, "family" may be literal family, or it may be a defining personal commitment that gives the work its meaning.
4	Benevolence / Legacy — The Impulse to Give Back	The drive to contribute something larger than yourself — to share what you have built, to leave something behind, to make a difference in the wider world. Rohn points to Andrew Carnegie, who as a young man wrote, "I will spend the first half of my life accumulating money and the last half giving it away." The clearest signal of this motivator: the person who asks, quietly, whether what they are doing actually matters.

Rohn's Core Insight: "To be successful, you need this very internal, very personal, very unique thing called motivation. And to acquire that innermost quality and set it to work, you need to recognize other people as reasons to believe." Every motivator on this list involves other people. Leadership failure is rarely about the work — it is about severing the human connection that makes the work feel worth doing.

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About Atlas Tech

Founded in 2009 in Austin, Texas by two former enterprise software architects, John Smith and Jim Smith, Atlas Tech began as a hardware-enabled payments terminal business targeting mid-market retailers. The original bet was simple: enterprises were tired of paying Tier 1 vendors for bloated hardware that required six-month implementation cycles. Atlas Tech would be faster, cheaper, and more reliable.

The bet paid off. By 2014, Atlas had 2,200 merchant clients and \$180 million in recurring hardware revenue. But John and Jim saw the real opportunity was not in the terminal. It was in the transaction data flowing through it. In 2015, they made a defining pivot: they embedded a SaaS analytics and workflow layer on top of their hardware platform and began selling it as an annual subscription. The product was called Atlas Insight.

The market responded immediately. Enterprise clients who had standardized on Atlas hardware began subscribing to Insight at an average contract value of \$48,000 per year. Net Revenue Retention climbed above 115%. By 2019, Atlas Insight ARR surpassed \$800 million, and the company successfully IPO'd on the NASDAQ at a \$2.8 billion valuation. In investor roadshows, John and Jim told analysts the same thing every time: "We are a SaaS company with a hardware moat."

That framing worked for a while, until recently when the company started to experience slower growth, higher customer churn, and the risk of a credit rating downgrade due to consistently lower performance that is not meeting expectations.

The Business Today

Metric	Value	Context / Signal
SaaS (Atlas Insight)	\$2.7B ARR	Subscription analytics, workflow, and AI features. 68% gross margin.
Hardware (Atlas Terminal)	\$1.8B	Smart payment terminals, 34% gross margin. Volume-linked to SaaS upsell.
Total Revenue	\$4.5B	Blended gross margin ~55%. EBITDA margin ~18%.
2-Year Avg Revenue Growth	15% YoY	Driven by SaaS NRR of 112% and hardware unit expansion.
Net Revenue Retention	112%	Strong but declining. Was 118% two years ago.
Wall Street's Expectations	20% YoY	Implies ~\$900M net new revenue vs. ~\$585M delivered last year.
Sales Quota Attainment	71% avg	620 quota-bearing reps at \$2.1M average quota. Well below plan.

Forecast Accuracy	80% (was 95%)	Dropped over 3 consecutive missed quarters. Board credibility eroding.
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How the Forecast Broke Down

Twelve months ago, Atlas Tech ran a clean forecast process. FP&A owned a top-down model anchored to segment ARR cohorts, ACV expansion curves, and a bottoms-up sales capacity model. Forecast accuracy ran at 95%, which is the best-in-class for a company at this scale.

Then three things happened simultaneously:

1. The CRO role turned over. The incoming CRO, John Doe, came from a pure-play SaaS company and immediately distrusted Atlas's blended pipeline methodology. He instructed sales managers to report pipeline using a new deal-stage weighting system his team built outside the CRM. Two competing pipelines emerged. Sales stopped trusting FP&A's numbers. FP&A stopped trusting Sales' inputs.
2. The product team launched Atlas Insight AI Tier, a \$12K annual add-on, mid-year. FP&A had no historical attach rate data for the new SKU and could not model it reliably. Sales began booking AI Tier bundles in ways that accelerated recognized revenue timing under ASC 606 in ways FP&A did not immediately catch, creating a \$34M variance in Q2.
3. CRM data quality collapsed. The person responsible for pipeline hygiene, Sarah Chen, the Sales Operations Manager, almost left for a competitor six months ago. Her manager at the time fought for her to stay, and she stayed. But her engagement dropped, and with it, the integrity of the data that every forecast was built on. Stale close dates. Duplicate opportunities. Missing ACV fields. The model was clean. The inputs were not.

THE CORE TENSION: The CRO believes 20% growth is unachievable and wants to double sales headcount. The CFO believes 18–20% is achievable with better execution and forecasting discipline. Neither side trusts the other's data. The Board has lost confidence. You, the Director of FP&A have 30 days to turn things around.

The Board's Ultimatum

BOARD COMMUNICATION (INTERNAL): At the last board meeting, the Lead Independent Director stated, "We cannot have four consecutive missed quarters going into an analyst day. If FP&A cannot produce a credible forecast, then we will need to reconsider whether the function is appropriately resourced and led." The CFO delivered this message to the FP&A Director the following Monday. Thirty days.

PART TWO | YOUR ROLE & YOUR TEAM

You Are the Director of FP&A

You joined Atlas Tech two months ago, recruited by CFO Jamie Carr to modernize the FP&A function. In your last two roles you reduced close cycles, built driver-based models, and successfully partnered with Sales and Operations. Atlas Tech felt like the opportunity to do it at scale.

The last two quarters have been brutal. The forecast misses were not your fault, and the work was done before your time, but they happened on your watch. Your team is exhausted. Your peer in Sales Operations is demoralized. The new CRO sees FP&A as an obstacle, and the CFO, while still supportive, is asking harder questions in every 1:1.

You are responsible for Board and investor revenue forecasts, sales capacity and quota planning, revenue and margin guidance, investment and hiring approval models, and any headcount or CapEx over \$250K.


YOUR MANDATE FROM THE CFO: Restore FP&A credibility. Fix the relationship with Sales. Get the forecast under control. Do not lose the team in the process. Thirty days.



Your Team Through Jim Rohn's Lens



What follows is an honest read of where each team member stands today, mapped to the Rohn motivator that is driving them, and the specific need that is going unmet. Pay attention to the gap between what each person is working for and what the organization is actually delivering.

<p>Lina Torres FP&A Manager Reports to you</p> <p> Jim Rohn Driver: Peer Recognition <i>Unmet Need:</i> Her peers see the work but credit Sales when things go right and blame Finance when they go wrong</p> <p> Burnout Risk</p>	<ul style="list-style-type: none"> 4 years at Atlas Tech. Deeply trusted by individual stakeholders across the business. Mediates conflict between Sales and Finance, absorbing it rather than resolving it structurally. Has never declined a request from Sales, creating scope creep and model inconsistency across OpCos. Running on empty. Shields the team from stress but does not escalate it to leadership. What Lina wants most, in Rohn's terms: to be seen and respected by the colleagues she works beside every day. That recognition is not arriving. <p><i>"No one even looks at the dashboards. We do all the work and nobody listens."</i></p>
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<p>James Whitfield Senior FP&A Analyst Reports to Lina</p> <p> Jim Rohn Driver:</p>	<ul style="list-style-type: none"> The best financial modeler on the team. Built the three-statement forecast model for Atlas from scratch. Defines his worth through output quality and speed, working nights and weekends for six consecutive weeks, for instance.
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<p>Expert / Mentor Recognition <i>Unmet Need:</i> The CFO and Director are not acknowledging his work — the two voices he has built everything to impress  Active Flight Risk</p>	<ul style="list-style-type: none"> • Has not received a performance review, title discussion, or even informal career feedback in 18 months. • In Rohn's framework: James is driven by the approval of respected experts — his CFO, his Director. That approval is not coming. He has started interviewing. • Currently in final-round interviews with a competitor. Has told no one. <p><i>"I have built everything this team runs on. I just want someone to notice."</i></p>
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<p>Kevin Park FP&A Analyst 4 months in  Jim Rohn Driver: Benevolence / Legacy <i>Unmet Need:</i> He joined to build something meaningful, and he's building Excel formulas for variance reports  Disengagement Risk</p>	<ul style="list-style-type: none"> • Joined from a Big 4 finance rotation program. Eager, fast learner, genuinely high potential. • Currently assigned exclusively to data pulls and variance commentary. Zero modeling exposure. • Joined Atlas Tech expecting to develop forecasting capability and understand how the business actually works. • In Rohn's terms: Kevin is motivated by the impulse to contribute something real — to leave a mark. That scope is completely absent from his current role. • His enthusiasm is visibly declining. He has begun asking peers about internal transfer opportunities. <p><i>"I thought this role was going to teach me how the business actually works."</i></p>
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<p>Sarah Chen Sales Operations Manager Peer to you  Jim Rohn Driver: Peer Recognition <i>Unmet Need:</i> She controls the data that makes every forecast possible — and is never in the room when it matters  System Risk / Recognition-Starved</p>	<ul style="list-style-type: none"> • Owns CRM hygiene, pipeline data, and bookings integrity — the single most critical FP&A data input. • When forecasts are wrong, Sales blames her. When they are right, Sales takes credit. • Had a competing offer six months ago. Stayed. But the reason she almost left has not been addressed. • In Rohn's framework: Sarah is motivated by peer recognition — specifically, the respect of her Sales colleagues, whose approval she will never receive if she remains positioned as a back-office function. • Her current state is not a personal failure. It is the predictable output of a system that extracts her contribution without crediting it. <p><i>"I am the reason the data exists. I am just never in the room when decisions get made."</i></p>
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PART THREE | THE ROUNDTABLE EXERCISE

Exercise Instructions

Work through four structured steps as a table. Each step builds on the previous one. Assign a scribe to capture your table's answers and a spokesperson to share back with the room.

Step	Focus	Time	Deliverable
1	Rohn Motivation Mapping	10 min	Scorecards — Rohn driver + gap for each person
2	Diagnose the System	15 min	Ranked risks + root cause analysis
3	Leadership Design	20 min	Three targeted interventions tied to Rohn motivators
4	The One Big Move	10 min	Single prioritized action + rationale
—	Table Report-Back	5 min	Spokesperson presents to room

STEP 1 ROHN MOTIVATION MAPPING 🕒 10 minutes

Using the Jim Rohn scoring cards in the Appendix, rate each of the four motivators (1 = not a driver, 5 = core driver) for each team member. You may score from your own perspective or from the perspective of someone you manage. Then discuss as a table:

- For each person: which Rohn motivator is their primary driver? Is the organization currently delivering on it?
- Where is the gap between what a person is working for and what leadership is providing?
- Which person has the highest stakes gap, where their primary Rohn driver is completely unmet right now?
- Are there two people whose unmet motivators are in direct tension? Is there a situation that appears to be a performance issue but is actually a leadership problem?




STEP 2 DIAGNOSE THE SYSTEM 🕒 15 minutes

Everyone on this team is working hard. Nothing is improving. Before you design any intervention, agree on what is actually broken. Rohn's insight: the problem is almost never effort. It is the severed human connection that made the effort feel meaningful. Discuss and record your answers:

Q1	James has built the entire forecast infrastructure and is actively interviewing. His primary Rohn driver is expert/mentor recognition. What specific moment or absence of a moment do you believe triggered his decision to look? What would it take to reverse it in 30 days?
Q2	Lina wants peer recognition from Sales colleagues who will never give it to her under the current structure. Is this a character problem or a structural one? What would change if Lina had formal decision rights in the CRO's monthly revenue review?
Q3	Sarah Chen controls the data pipeline that every forecast is built on. Her Rohn driver of peer recognition is being systematically denied by the Sales team. As Director of FP&A, you do not manage her. What is your authority, and how do you use it?
Q4	Kevin joined to contribute something meaningful: a benevolence/legacy motivator showing up early in a career. He is running data pulls. What is the cost, in real dollars and organizational risk, of losing him in year one? What is the one assignment that would change his trajectory immediately?
Q5	Rohn says that motivation is never truly internal. It requires other people as "reasons to believe." As the Director, how are you serving as a reason to believe, and what are you failing to offer each person as their specific motivational anchor?

STEP 3 LEADERSHIP DESIGN ⌚ 20 minutes

You have 30 days and limited political capital. Choose three targeted interventions, one in each Rohn category. Be specific: name the person, name the action, tie it explicitly to their primary motivator, and define what "done" looks like.

Rohn Motivator Category	Your Intervention — Be Specific	Done Looks Like
 Peer Recognition	<i>Who needs to be seen by their colleagues and what is the vehicle to deliver that recognition publicly and credibly?</i> Your answer: _____	_____ _____
 Expert / Mentor Recognition	<i>Who needs to hear from you or the CFO, specifically, not generically, that their contribution has been seen and valued?</i> Your answer: _____	_____ _____
 Family / Benevolence / Legacy	<i>Who needs their work connected to something larger, a person it helps, a mission it serves, or a future it builds?</i> Your answer: _____	_____ _____

Example: For peer recognition, present Sarah Chen's pipeline integrity work by name at the next Revenue Review meeting with the CRO's team present. Explicitly credit her as the architect of the data infrastructure that makes forecasting possible.

Example: For expert/mentor recognition, schedule a 30-minute 1:1 with James and the CFO. Prepare Jamie with three specific model contributions James has made. Let Jamie deliver the recognition. Watch what changes.

Example: For legacy/benevolence, assign Kevin to own the AI Tier attach rate model, which is the single biggest unknown in the \$900M growth gap. Give him a real problem with a real number attached to it. Connect the work to what it means for the company's guidance.

STEP 4 THE ONE BIG MOVE ⌚ 10 minutes

If your table could do only one thing in the next 30 days, make just one move that unlocks everything else, then what would that be? Ground it in Rohn: which person's primary motivator does it serve, and why does serving that motivator have the highest multiplier effect on team performance and FP&A credibility?

"In the next 30 days, we will..."

The Rohn motivator this serves: _____

This unlocks: _____

When your spokesperson presents, be ready to answer: what do you trade off by making this your priority? Who does it not benefit, and have you accounted for the risks?

PART FOUR | TABLE REPORT-BACK FORMAT

What Each Table Shares with the Room

Each table has 3-4 minutes. Your spokesperson should address the following three points clearly and without preamble:

01	<p>The Biggest Flight Risk</p> <p>Who, the specific Rohn motivator that is unmet, and the precise trigger event that would cause them to leave in the next 30 days. Not a general statement. A specific, credible scenario.</p>
02	<p>The Most Dangerous Invisible Gap</p> <p>Which Rohn motivator was most structurally undersupplied by leadership, and how did that become invisible over time? Why did no one catch it before it became a system risk?</p>
03	<p>Your One Big Move</p> <p>What your table chose, which Rohn motivator it directly serves, why it was prioritized over the others, and what trade offs you knowingly accepted. Share your reasoning.</p>

APPENDIX | JIM ROHN MOTIVATION SCORECARDS

Jim Rohn's Four Motivators — Team Scorecards

Rate each of the four Jim Rohn motivators from 1 (not a driver) to 5 (core driver) for each team member. Use the signal row at the bottom of each card to identify leadership risk patterns. Score honestly, not aspirationally.

Scale Reference: 1 = Not a driver | 2 = Slight influence | 3 = Moderate driver | 4 = Strong driver | 5 = Core driver

Lina Torres FP&A Manager Primary Driver: Peer Recognition						
Jim Rohn Motivator	1	2	3	4	5	Score
Peer Recognition <i>Respect from teammates, colleagues, and those beside you day-to-day</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Expert / Mentor Recognition <i>Approval & acknowledgment from a leader or authority you admire</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Family / Who Are You Doing This For <i>Motivation rooted in love for specific people — those who depend on you</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Benevolence / Legacy <i>Drive to give back, contribute to something larger, leave a lasting impact</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Jim Rohn Signal: High Peer Recognition need + invisible = silent departure High Expert Recognition need + no mentor = losing belief High Family/Who need + no purpose link = disengagement High Legacy need + no scope = unfulfilled high-performer						

James Whitfield Senior FP&A Analyst Primary Driver: Expert / Mentor Recognition						
Jim Rohn Motivator	1	2	3	4	5	Score
Peer Recognition <i>Respect from teammates, colleagues, and those beside you day-to-day</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Expert / Mentor Recognition <i>Approval & acknowledgment from a leader or authority you admire</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5

Family / Who Are You Doing This For <i>Motivation rooted in love for specific people — those who depend on you</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Benevolence / Legacy <i>Drive to give back, contribute to something larger, leave a lasting impact</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Jim Rohn Signal: High Peer Recognition need + invisible = silent departure High Expert Recognition need + no mentor = losing belief High Family/Who need + no purpose link = disengagement High Legacy need + no scope = unfulfilled high-performer						

Kevin Park FP&A Analyst Primary Driver: Benevolence / Legacy						
Jim Rohn Motivator	1	2	3	4	5	Score
Peer Recognition <i>Respect from teammates, colleagues, and those beside you day-to-day</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Expert / Mentor Recognition <i>Approval & acknowledgment from a leader or authority you admire</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Family / Who Are You Doing This For <i>Motivation rooted in love for specific people — those who depend on you</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Benevolence / Legacy <i>Drive to give back, contribute to something larger, leave a lasting impact</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Jim Rohn Signal: High Peer Recognition need + invisible = silent departure High Expert Recognition need + no mentor = losing belief High Family/Who need + no purpose link = disengagement High Legacy need + no scope = unfulfilled high-performer						

Sarah Chen Sales Operations Manager (Peer) Primary Driver: Peer Recognition						
Jim Rohn Motivator	1	2	3	4	5	Score
Peer Recognition <i>Respect from teammates, colleagues, and those beside you day-to-day</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Expert / Mentor Recognition <i>Approval & acknowledgment from a leader or authority you admire</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Family / Who Are You Doing This For <i>Motivation rooted in love for specific people — those who depend on you</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Benevolence / Legacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5

<i>Drive to give back, contribute to something larger, leave a lasting impact</i>						
<p>Jim Rohn Signal: High Peer Recognition need + invisible = silent departure High Expert Recognition need + no mentor = losing belief High Family/Who need + no purpose link = disengagement High Legacy need + no scope = unfulfilled high-performer</p>						

Yourself Director of FP&A Self-Assessment						
Jim Rohn Motivator	1	2	3	4	5	Score
Peer Recognition <i>Respect from teammates, colleagues, and those beside you day-to-day</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Expert / Mentor Recognition <i>Approval & acknowledgment from a leader or authority you admire</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Family / Who Are You Doing This For <i>Motivation rooted in love for specific people — those who depend on you</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
Benevolence / Legacy <i>Drive to give back, contribute to something larger, leave a lasting impact</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	___/5
<p>Jim Rohn Signal: High Peer Recognition need + invisible = silent departure High Expert Recognition need + no mentor = losing belief High Family/Who need + no purpose link = disengagement High Legacy need + no scope = unfulfilled high-performer</p>						

Jim Rohn's Final Word on Motivation:

When you look at these four motivators, what do you really see? The thing I notice immediately is that they all involve other people — whether peers, mentors, family, or fellow members of the human race. Motivation is not something you generate alone. It is something you generate in relationship. The leader's job is to be that relationship.

— Jim Rohn, *Leading an Inspired Life*