

## Operating Model: Consultancy + SaaS

### Blending Service Revenue with Scalable Productisation



#### Dual Revenue Engine

Leverages consultancy for high-value, upfront revenue and SaaS for scalable, recurring income – creating resilience and flexibility in business operations.



#### Structured Client Journey

Every client moves from discovery to strategy, custom build, and into ongoing value – creating a natural upsell path into support or SaaS offerings.



#### Repeatable Innovation

Insights and demand patterns from consultancy projects feed into SaaS product ideation – enabling validated, low-risk product development.



#### Scalable without Overhead

SaaS spin-offs scale without needing proportional increases in delivery effort – decoupling growth from headcount and time.

This operating model is built to combine the best of both worlds: consultancy cash flow and SaaS scalability. By starting with service-based engagements, the business can secure revenue while building trust and deeply understanding client pain points. Each project follows a structured flow – from discovery workshops to automation strategy, then into solution delivery and long-term support. When patterns emerge, those custom solutions become the seedbed for SaaS offerings that are already validated by real demand. This creates a sustainable, scalable engine – consultancy funds product development and builds your reputation, while SaaS generates margin-rich, recurring revenue with minimal marginal cost.

## Revenue Streams Overview

### Bundled for Simplicity – From Consultancy to SaaS

- **Discovery & Process Mapping:** Entry-level engagement to diagnose workflows and identify pain points. Formats include workshops and interviews. Priced from £2K (SME) to £40K (mid-size).
- **Automation Roadmap & AI Strategy:** Develops prioritised automation plans with cost/benefit models. Delivered as a roadmap report. Fees range from £5K to £50K+.
- **AI Architecture & Custom Build:** Design and build bespoke automation tools (e.g., booking systems, dashboards) using platforms like Python, Bubble, Airtable. Priced up to £100K+.
- **Support & Retainers:** Ongoing client support, training, and optimisation on monthly retainers from £1K to £20K.
- **SaaS Productisation:** Repeatable solutions are spun off into subscription-based SaaS products, generating scalable recurring income from £50 to £1,000/month.

This slide illustrates how revenue is strategically bundled across a spectrum – from consultancy services through to SaaS offerings. Each revenue stream is designed to either deepen client engagement or scale income through productisation. We begin with process mapping and discovery, which help establish trust and identify inefficiencies. From there, we shift to roadmap creation, building a clear path to automation. The delivery phase involves hands-on product development, followed by recurring income opportunities via support retainers. When patterns emerge, these builds evolve into SaaS products – turning client challenges into scalable solutions.

# Discovery & Process Mapping

## Laying the Foundation for Smart Automation

- **Objective Diagnosis:** Identify inefficiencies, bottlenecks, and manual pain points through deep exploration of current workflows.
- **Interactive Workshops:** Facilitated sessions using interviews and journey mapping to visually capture existing processes and pain areas.
- **Scalable Entry Point:** Pricing tiers cater to client size – from £2–10K for SMEs to £20–40K for mid-size firms, making it accessible yet impactful.
- **Actionable Deliverables:** Clients receive process documentation and immediate 'quick win' recommendations – adding fast value.



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1

Discovery and process mapping is more than just a consulting formality – it's the strategic starting point for all automation work. These sessions are designed to uncover how work really gets done, not just how it's supposed to. Through facilitated interviews and visual journey mapping, we expose the pain points, gaps, and hidden inefficiencies that are ripe for improvement. This data-driven approach helps create buy-in from stakeholders and builds a compelling case for change. Importantly, this phase is designed to be scalable – providing value even at a modest investment. Clients walk away with not just documentation but clear, actionable steps, setting the stage for roadmap and build phases.

# Automation Roadmap & AI Strategy

## From Opportunity Identification to Investment Case



**Prioritisation of Automation**  
Evaluates workflows to identify high-impact, high-feasibility automation candidates – balancing quick wins with strategic gains.



**Cost-Benefit Analysis**  
Each opportunity is assessed with a tailored ROI model, forecasting time savings, quality improvements, and cost reductions.



**Tool & Platform Alignment**  
Recommends appropriate tools (e.g., AI, RPA, low-code) based on need, maturity, and existing infrastructure.



**Roadmap Delivery**  
Delivered as a structured playbook or implementation roadmap that guides the next phases of development.

2

This phase bridges discovery and delivery by crafting a tactical automation strategy tailored to each client's needs. The goal is to translate insights from the mapping phase into a structured, actionable roadmap. We start with a prioritisation framework to select automation candidates that are not only valuable but also feasible within budget and technical constraints. Every opportunity is backed by a business case – outlining cost, time savings, and impact. The final output is a tailored playbook – guiding the build phase with clarity, justification, and stakeholder alignment. This roadmap becomes the client's investment case, often unlocking internal funding or executive buy-in.

## AI Architecture & Custom Build

### Designing Bespoke Solutions for Automation & Intelligence



#### Tailored System Design

Each build starts from business needs – creating bespoke solutions using tools like Bubble, Airtable, Power Automate, and Python.



#### Full Lifecycle Delivery

From UX prototyping to AI model training, solutions are built end-to-end with user feedback loops and agile iteration.



#### Versatile Use Cases

Common builds include booking platforms, invoicing automation, and real-time dashboards – adapted to sector-specific needs.



#### Flexible Pricing Tiers

SME builds typically range £5–50K, with enterprise projects reaching £100K+ depending on complexity and integrations.

3

Now we shift from strategy to execution. The custom build phase transforms planning into live automation – delivering real tools that clients use daily. Each solution is architected around business context and user goals. We use low-code platforms for rapid deployment when suitable, and switch to Python or AI-native tools when complexity demands it. Builds range from internal dashboards to client-facing booking systems. This stage is the delivery engine of the operating model – creating tangible value, locking in client loyalty, and planting the seeds for future SaaS spin-offs. It's also a key revenue generator, particularly at the mid-size and enterprise level.

## SaaS Productisation

### Turning Repeatable Builds into Scalable Products

- **From Custom to Common:** Identify frequently requested solutions from consultancy engagements – e.g., booking systems or clinic automation – as product candidates.
- **Minimal Delivery Cost:** Unlike consulting, SaaS products scale without direct effort, offering high-margin, recurring revenue.
- **Segmented Pricing:** SME subscriptions priced at £50–200/month, with enterprise offerings at £500–1,000/month – enabling upsell and market fit flexibility.
- **Framework-Driven Builds:** Standardised development enables reusability across clients, accelerating delivery while maintaining customisability.

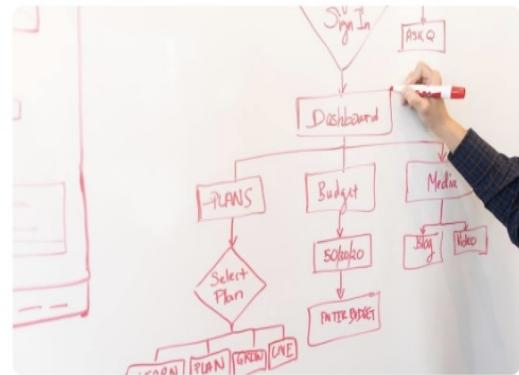


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5

The final stage of the hybrid model – SaaS productisation – leverages repeatability to unlock scale. As patterns emerge across clients, we convert popular builds into ready-to-use SaaS offerings. This approach eliminates the time-for-money tradeoff. Once built, SaaS products require minimal delivery effort, enabling wide distribution and recurring income with strong margins. With thoughtful segmentation, these products serve both SMEs and larger clients. More importantly, SaaS acts as a brand extension – often driving inbound interest in consulting as well. It's the compounding asset in your model.

## Operating Model Flow

### Client Journey from Consulting to Scalable SaaS

- **Step 1: Acquire Client:** Begin with a consultancy engagement – setting expectations and opening up the value journey.
- **Step 2: Discovery:** Paid discovery phase involving deep-dive workshops and process mapping to reveal automation opportunities.
- **Step 3: Strategy Roadmap:** Deliver a prioritised automation strategy, with ROI models and tool recommendations.
- **Step 4: Build & Deliver:** Custom automation or product development based on roadmap priorities, delivered via agile cycles.
- **Step 5: Retain or Productise:** Clients either enter support retainers or get offered SaaS solutions derived from repeatable builds.

6

This flow illustrates the client journey through the full operating model. It's designed to provide value at every stage while enabling strategic upsells and long-term engagement. Clients typically start with a discrete consultancy need, often unclear on the full potential of automation. The discovery phase helps illuminate pain points and builds trust. The strategy roadmap then converts those insights into a tactical plan. Once clients see tangible benefits from delivery, it becomes easier to transition them into ongoing support or SaaS subscriptions – closing the loop and unlocking both recurring revenue and product validation.

## Optimising Without Overcommitting

### Balancing Delivery, Productisation, and Focus



**Consultancy as Cash Engine**  
Prioritise excellence in delivery and client outcomes – using consultancy revenue to fund learning and experimentation.



**Design for Reuse**  
Approach each build with modularity in mind – asking whether parts can be reused, packaged, or productised.



**Pattern Recognition**  
Track recurring client demands (3+ instances) to surface SaaS candidates with validated market demand.

7

A key challenge in hybrid consultancy-SaaS models is balancing opportunity with focus. This slide outlines a playbook to grow smartly – building assets without burning out or overcommitting. First, keep consultancy lean and outcome-driven. This generates capital and credibility while giving you a lens into client challenges. From here, look for reuse – can this dashboard, this logic, or this process become a repeatable component or even a SaaS module? Finally, track patterns. When multiple clients ask for a similar solution, that's not just a trend – it's a business opportunity. Build what people are already asking for.

## Practical Framing: Consultancy to SaaS to Exit

### Aligning Strategy Across Time Horizons

- **Short-Term: Consultancy Growth:** Focus on case studies, cash flow, and delivery excellence – building trust and validating demand.
- **Mid-Term: SaaS Incubation:** Spin off frequently requested builds into low-cost SaaS products – starting small with paying users.
- **Long-Term: Choose Your Exit:** Optimise either for consultancy sale (to PE firms or roll-ups) or scale SaaS for venture-backed growth and acquisition.



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8

This final framing helps guide your decisions as you grow – across short, mid, and long-term horizons. In the short term, your consultancy must be your engine. Deliver well, generate strong case studies, and build cash flow. These activities pay the bills and also surface repeatable patterns. Once patterns emerge, begin productising – even in lean MVP form. The goal is to prove demand and build traction without excessive overhead. From here, you have optionality: do you sell the consultancy, scale the SaaS, or hold both? This clarity helps align your team and investments with the outcomes you care most about.

## Support & Retainers

### Ensuring Longevity Through Ongoing Value

- **Ongoing Optimisation:** Continuous improvement of automation tools, data flows, and AI models based on real-world use and client feedback.
- **Training & Enablement:** Hands-on client training sessions to ensure adoption, self-sufficiency, and expanded usage across teams.
- **Support SLAs:** Defined service-level agreements for issue resolution, updates, and monitoring – bringing clarity and professionalism.
- **Recurring Revenue:** Monthly retainers priced from £1K to £20K create predictable income and deepen client relationships.



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4

Support and retainers aren't just afterthoughts – they're an essential pillar of the operating model, converting one-time projects into long-term partnerships. Clients benefit from continuous optimisation as their systems evolve, and we ensure tools stay aligned with business changes. We also provide structured training and proactive updates, rather than reactive support. This model stabilises cash flow and builds deep client integration. It's a critical bridge to SaaS – offering recurring revenue while also surfacing new productisation opportunities based on usage patterns and unmet needs.