

Control the Outcome of Your Investment



Situation

B2B SaaS

\$3-\$10M ARR

15-50 FTE

Your investment needs attention

- ROI in question
- Organization underperforms
- Staff exodus
- Client retention challenge
- Flat ARR
- CEO seeks perspective

We protect the investment
and support the CEO



Outcomes

Lifestyle Business
Exit

- Peak Valuation
- Long Term Value
- Accelerate Performance

Limited investment of 18 to 24 months, measured outcomes and path to success.



Why

Control The Outcome

You want your business to become a successful company with a 4 day workweek, unlimited PTO, employing a majority of A players, 250K+ revenue per FTE and a visionary CEO that has time to think and enjoy their lifestyle.



How

10 thousand iterations

Iterative approach applies first principles reasoning to control the outcomes.

Systems deployed produce :

- Order out of chaos
- Optimize for time and value
- Drive innovation

What



Investment

- People
- Process
- Technology
- 12-18 months
- Cash/Equity mix

Approach

- Systems over Goals
- System of Reason
- System of Work
- System of Implementation
- EOS
- Topgrading



Outcomes

Peak Valuation

- Product innovation
- Revenue per FTE
- Client & Revenue Retention

Long Term Value

- Order and stability
- Risk mitigation
- Increasing ARR
- Topgrading Talent

Accelerate Performance

- Rapid engineering
- Operational efficiency



Why us?

Control the outcome

- Partner relationship
- We are vested in the outcome
- Operational team

We live the business and own the outcomes.



The Approach

Control the Outcome

Systems over Goals



Order Out of Chaos

- Metrics
- Level 10
- Prioritization
- OKRs
- 1:1s
- Core Values/Focus
- EOS Integration
- Radical Candor
- Definition of Done

Optimize for Time & Value

- 10 Thousand Iterations
- Clients First
- Continuous Delivery
- Monitoring
- 1/3/5 Year Targets
- Frugality
- Topgrading
- Automate the Mundane
- Owners Mindset
- Running Lean

Drive Innovation

- Product Roadmap
- MVT
- Hackathons
- Low Code POCs
- Moonshot
- Data Products
- Innovation Teams

System of Reason



Idea Evaluator

	People	Process	Technology
Revenue Generation	<div>First Principles</div> <div>30-60-90 Plan</div> <div>Pareto Principle - 80/20 Rule</div>		
Cost Savings			
Risk Mitigation			

System of Work



Workstreams

- **Innovation** (Product Development, Data Products, API, Data Warehouse)
- **Business Continuity** (Operations, Customer Support, Engineering Resources, Security Compliance)
- **Tech Debt Reduction** (Engineering Maturity, Risk Mitigation, Cost Savings)

Metrics

- | | | |
|----------|---------------------|------------------------------|
| ● Costs | ● Client Retention | ● Glassdoor Score |
| ● Uptime | ● Revenue Retention | ● People at Risk |
| ● Issues | ● Vendor Scorecard | ● Objectives and Key Results |

System of Implementation



Initiative	Q1	Q2	Q3	Q4	Q1	Q2
Production Support (BC)	Early systems stabilization, issue resolution, customer requests, run the machines					
Engineering Resources (BC)		Diversification, focused mentoring				
Operational Efficiency (BC)		Operational expense reduction, workflow automation				
Security Compliance (BC)			External compliance audit, systems improvement			
Data Products (IV)			Data Lake, Consumer 360, Retailer 360, Product 360			
Data Warehouse (IV)	Data integrity, metrics, reports, trust the data					
Product Development (IV)	New products, enhancements					
Engineering Maturity (TD)	Tech Debt, System Monitoring					

(IV) - Innovation, (BC) - Business Continuity, (TD) - Tech Debt Reduction



Learn

- Clients status
- The team
- Vendor status
- Single source of truth
- Moonshot
- 5 Pillars
- Metrics and insights
- Core values
- Definition of Done
- OKRs

Analyze

- People
- Process
- Technology
- Risks
- Revenue opportunities
- Costs savings
- Roadmap
- Opportunities
- Capabilities
- Investment

Implement

- Strategy
- Tactics
- Scorecard
- Product Roadmap
- Moonshot
- Data Products
- Innovation Teams
- Optimize
- Democratize

System of Work

System of Reason

Systems over Goals

Confirm and Mitigate

- Single point of failure (critical engineering dependency on individuals)
- Engineering resources turnover
- Limited technical onboarding process
- Limited engineering practices (needs maturity and detailed metrics)
- Existing tech stack is aging
- Constrained engineering innovation and product roadmap
- Missing security best practices (people, process, technology)
- Engineering in support mode only
- Limited documentation for infrastructure and current/planned operating expense
- No defined plan to outsource integrations and support
- Peak valuation factors are undetermined

Control the outcome of your investment

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