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

Peak Valuation

Long Term Value

Accelerate Performance

Lifestyle Business

Exit

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



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



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?

Partner relationship

We are vested in the outcome

Operational team

Control the outcome

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	First Principles 30-60-90 Plan Pareto Principle - 80/20 Rule		
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)

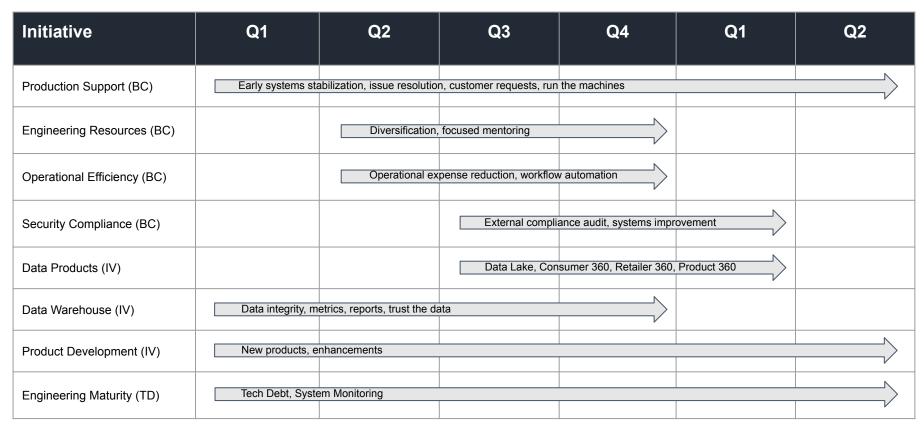
Metrics

- Costs
- Uptime
- Issues

- Client Retention
- Revenue Retention
- Vendor Scorecard

- Glassdoor Score
- People at Risk
- Objectives and Key Results

System of Implementation



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

Risk Identification

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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