

Revenue & Profit Trends

Simulated Data Analysis | Business Analyst Portfolio Project

Created by: Jade Herman, MBA | Business Analyst

Disclaimer:

This presentation is based on a simulated dataset created for illustrative and analytical purposes only. The information presented is fictional and not derived from real customer data.

Business Problem

Hopify, a fictional SaaS company, launched a revenue and profitability analysis to better understand growth dynamics across its three primary segments: Enterprise, Mid-Market, and SMB.

Leadership sought answers to three key questions:

- How are ARPU, NRR, and GRR trending across segments over time?
- Which segments are contributing most—and least—to revenue growth?
- Where are the greatest opportunities to improve retention, drive expansion, or adjust pricing strategy by segment?

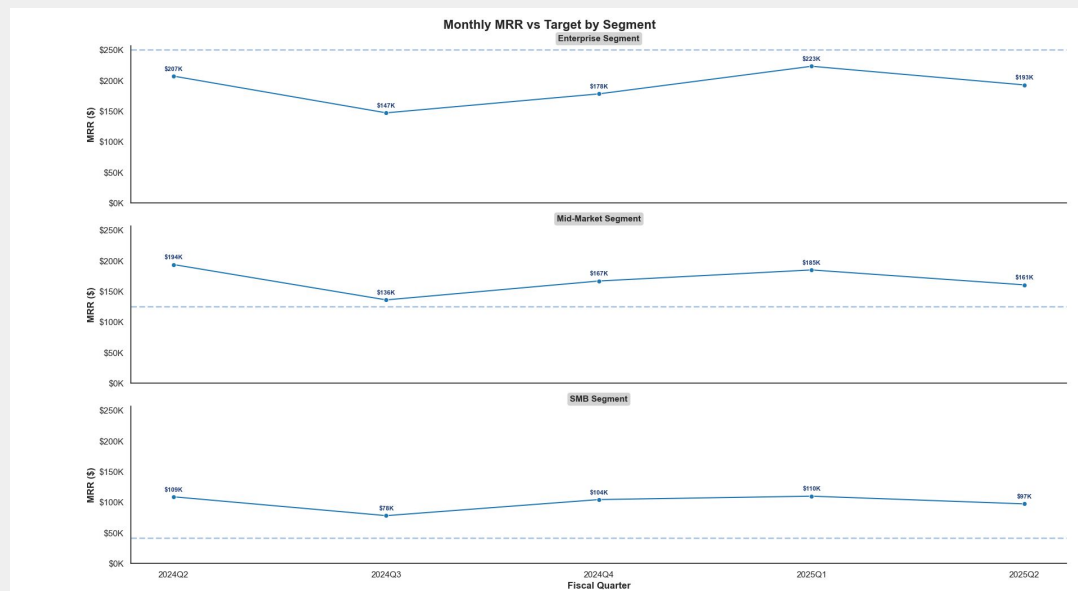
KPI Overview by Segment

Metric	Enterprise	Mid-Market	SMB
CAC* Payback	11.4 days	2.2 days	0.3 days
LTV* vs Target	+38% above target	+92% above target	+275% above target
MRR Performance	⚠ Under target	👍 Exceeds target	👍 Exceeds target
ARPU* Performance	⚠ Under target	⚠ Under target	👍 Exceeds target
Expansion Revenue Trend	⚠ Flat to declining	🔥 Moderate growth	💪 Strong growth
NRR	💪 Strong	💪 Strong	▼ Weak
GRR	▼ Declining	▼ Declining	▼ Declining

** Further review of CAC, LTV, and ARPU data integrity is recommended before drawing definitive conclusions or implementing pricing or retention strategy changes.*

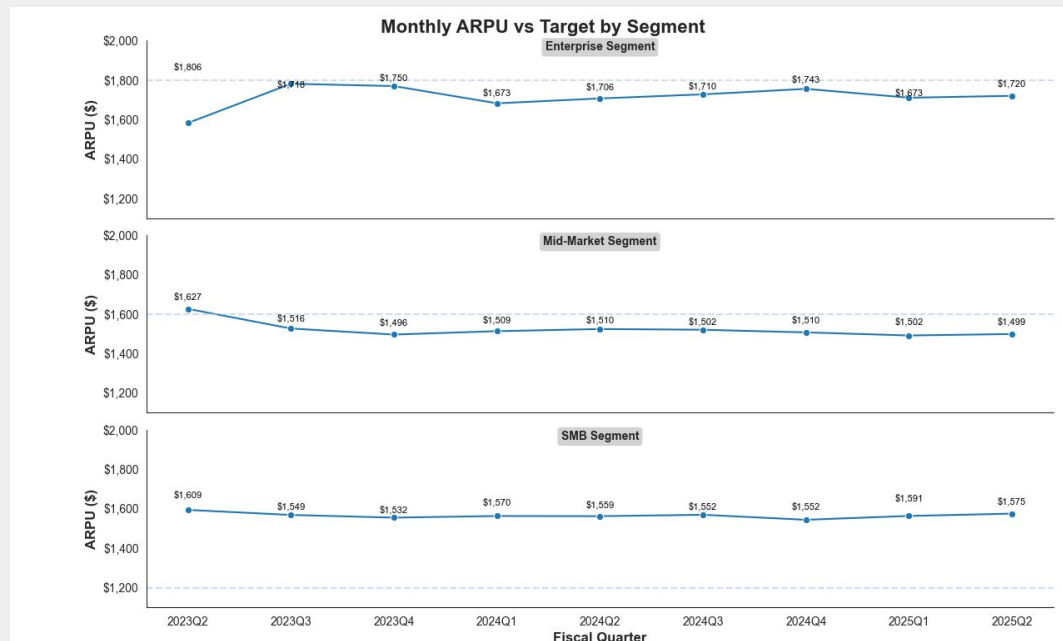
Monthly MRR vs Target by Segment

- Enterprise consistently underperforms, indicating potential issues with acquisition, onboarding, or product fit.
- Mid-Market mostly meets or exceeds targets, with mild dips in 2024 Q3 and 2025 Q2.
- SMB consistently exceeds MRR targets, suggesting strong initial plan-fit and growth.



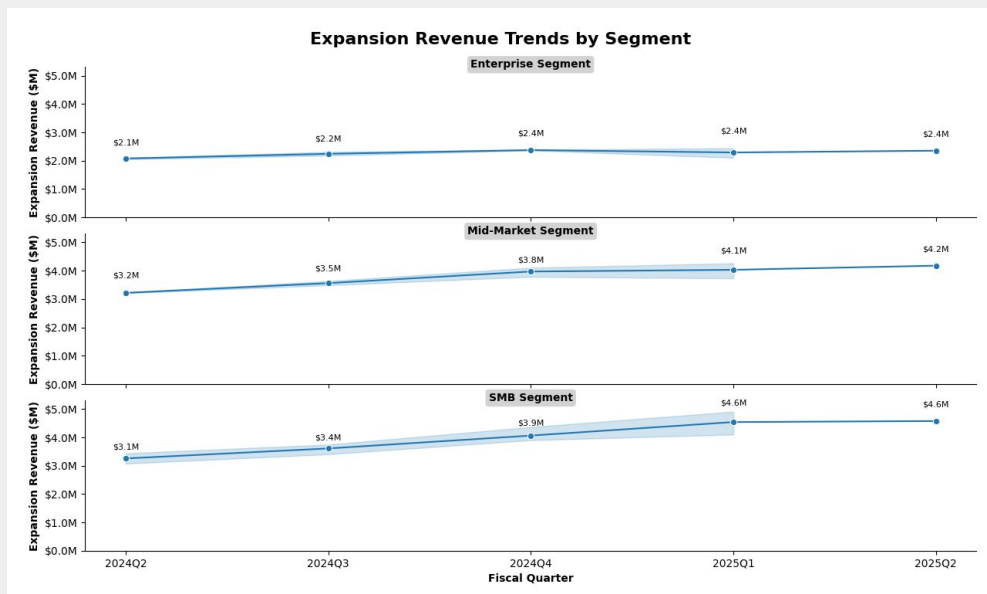
Monthly ARPU vs Target by Segment

- SMB consistently exceeds ARPU targets — strong pricing fit or higher attach rate.
- Enterprise underperforms against ARPU benchmarks in most quarters.
- Mid-Market fluctuates around target — suggests pricing and usage optimization opportunity.



 Further review of ARPU data integrity is recommended before making strategic pricing adjustments.

Expansion Revenue Trends Over Time



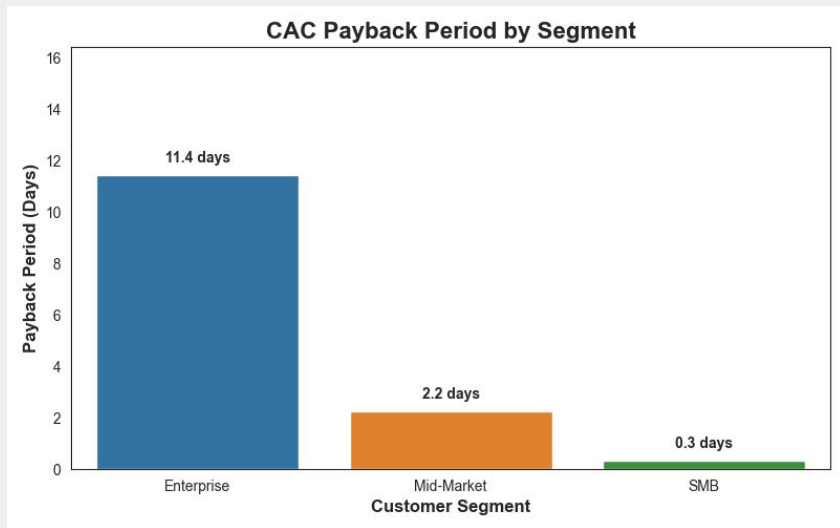
SMB and Mid-Market show consistent expansion growth, reflecting strong upsell or plan expansion trends.



Enterprise trails other segments — potential indicator of stagnant usage or lower plan flexibility.

 Consider tailored upsell strategies for Enterprise customers to improve NRR.

CAC Payback: All Segments <1 Month — Possible Underreporting

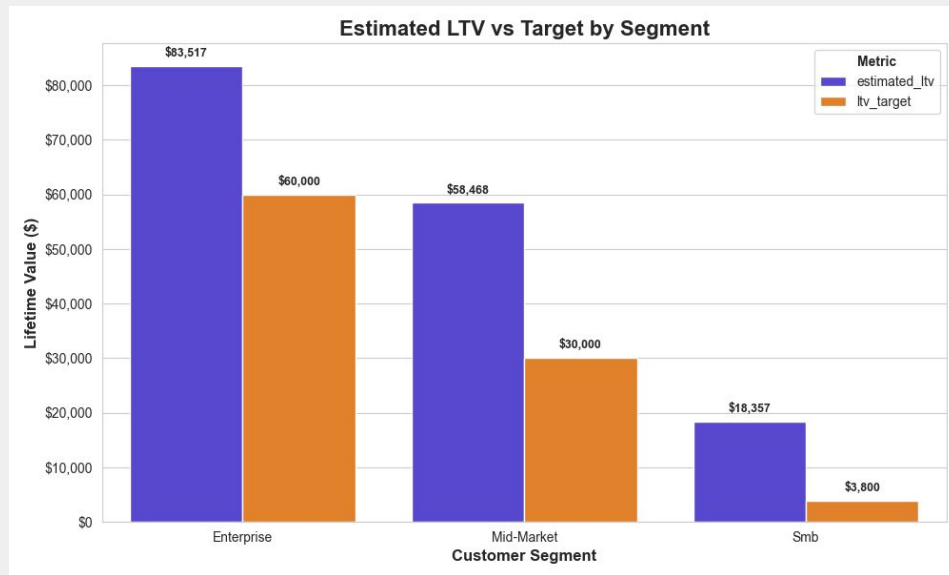


- CAC Payback for all segments is under 30 days — classified as "Excellent" by industry benchmarks.
- Results may indicate incomplete CAC capture or overly optimistic assumptions.

 *Recommend reviewing CAC input sources and attribution model for accuracy.*

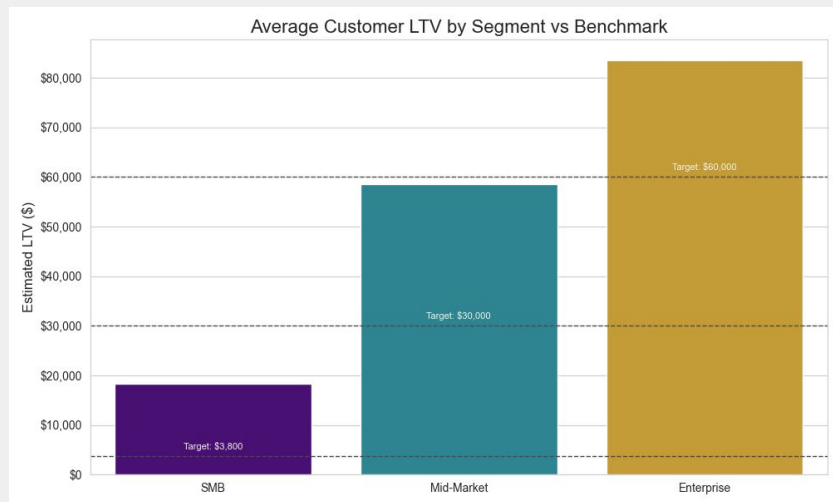
Estimated LTV Exceeds Target — Validation Needed

- LTV estimates exceed targets across all segments, especially Mid-Market and Enterprise.
- This may reflect optimistic revenue assumptions or underestimated churn risk.
- Recommend revalidating LTV calculation logic (e.g., ARPU inputs, churn rates).



📌 LTV depends heavily on accurate ARPU and retention estimates — further validation is recommended, as both inputs vary by segment in earlier analysis.

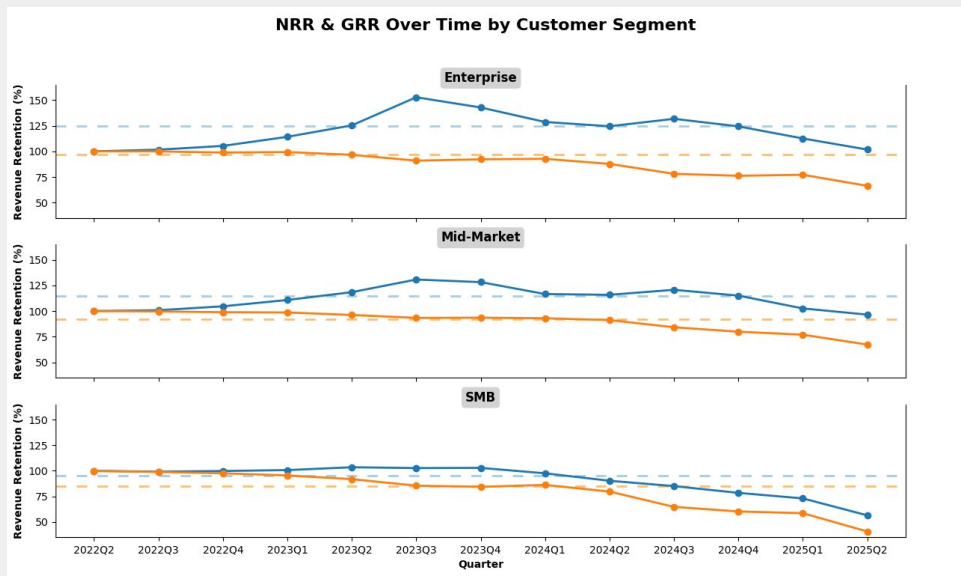
Estimated LTV: Segment Comparison



- Enterprise shows the highest lifetime value per customer, followed by Mid-Market and SMB.
- Variance aligns with segment pricing and retention patterns observed earlier.

📌 Continue refining LTV estimates as ARPU and churn metrics are adjusted.


Net Revenue Retention vs Gross Revenue Retention



➤ Enterprise maintains strong NRR performance, indicating successful upsell or retention expansion.

➤ GRR is slowly declining across all segments — an early signal of churn risk.

!! NRR above 100% reflects expansion;
GRR below 90% suggests revenue loss from churn.

 *Recommend deeper analysis of post-sale engagement and onboarding strategies.*

Key Findings

⚠️ Several KPIs — including ARPU, CAC, and LTV — rely on segment-level inputs that may require further validation. Findings should be interpreted directionally until data accuracy is confirmed.

- SMB & Mid-Market consistently exceed MRR and ARPU targets — pricing or target adjustments may be needed.
- Enterprise underperforms on MRR, ARPU, and Expansion despite high LTV — investigate pricing, onboarding, or upsell levers.
- All segments show CAC payback <1 month and LTV above benchmarks — may reflect underreported CAC or optimistic LTV.
- GRR is declining across segments — potential churn risk despite strong NRR.
- NRR remains strong for Enterprise and Mid-Market, driven by early expansion revenue.

Recommendations & Next Steps



Note on Data Integrity

KPI actions below should be viewed as directional pending full validation of ARPU, CAC, and LTV inputs.

Review SMB/Mid-Market Targets

→ Adjust pricing or benchmarks to reflect sustained outperformance.

Audit Enterprise Strategy

→ Reassess onboarding, upsell, and product fit to boost MRR and Expansion.

Validate CAC & LTV Metrics

→ Confirm attribution and retention logic behind current estimates.

Address GRR Decline

→ Test retention pilots (e.g., proactive support, usage nudges).

Scale What Works

→ Double down on growth plays in high-performing segments.

Thank You

Happy to discuss further - just reach out!



[LinkedIn Profile](#)



jade.hermanMBA@gmail.com



Portfolio: [Business Analysis Portfolio](#)



Github: <https://github.com/j-herman99/hopify-saas-kpi-analysis>