

POSSIBLE (RE)DEFINED

Ensuring Your SaaS Company is Built to Scale

Publication Date: June 22, 2023



A Fast-Moving Climate Requires A New Way of Thinking

Possible (Re)Defined^{by} Go further, faster

Gain confidence and clarity to tackle challenges
or plan for tomorrow's aspirations

AREA OF FOCUS

Digital Transformation

Ensuring Your SaaS Company Is Built to Scale

Learning Objectives

KNOWLEDGE



IDENTIFY:
signs your
organization is ready
for the next stage
of growth



PREPARE:
As a leader, how do
you prepare your
organization for
next steps?



GROWTH:
How to achieve growth
retention, expanding
with the clients you
already have?



TIME
When is the right
time to consider
upgrading your
solution?

CPE INFORMATION

Program Level: BASIC

Recommended CPE: 1

Field of Study: Business

Management & Organization

Program Prerequisite: NONE

Advanced Preparation: NONE

WELCOME

Today's Presenters



Scott Schimberg

Partner
SaaS Industry Leader
Armanino



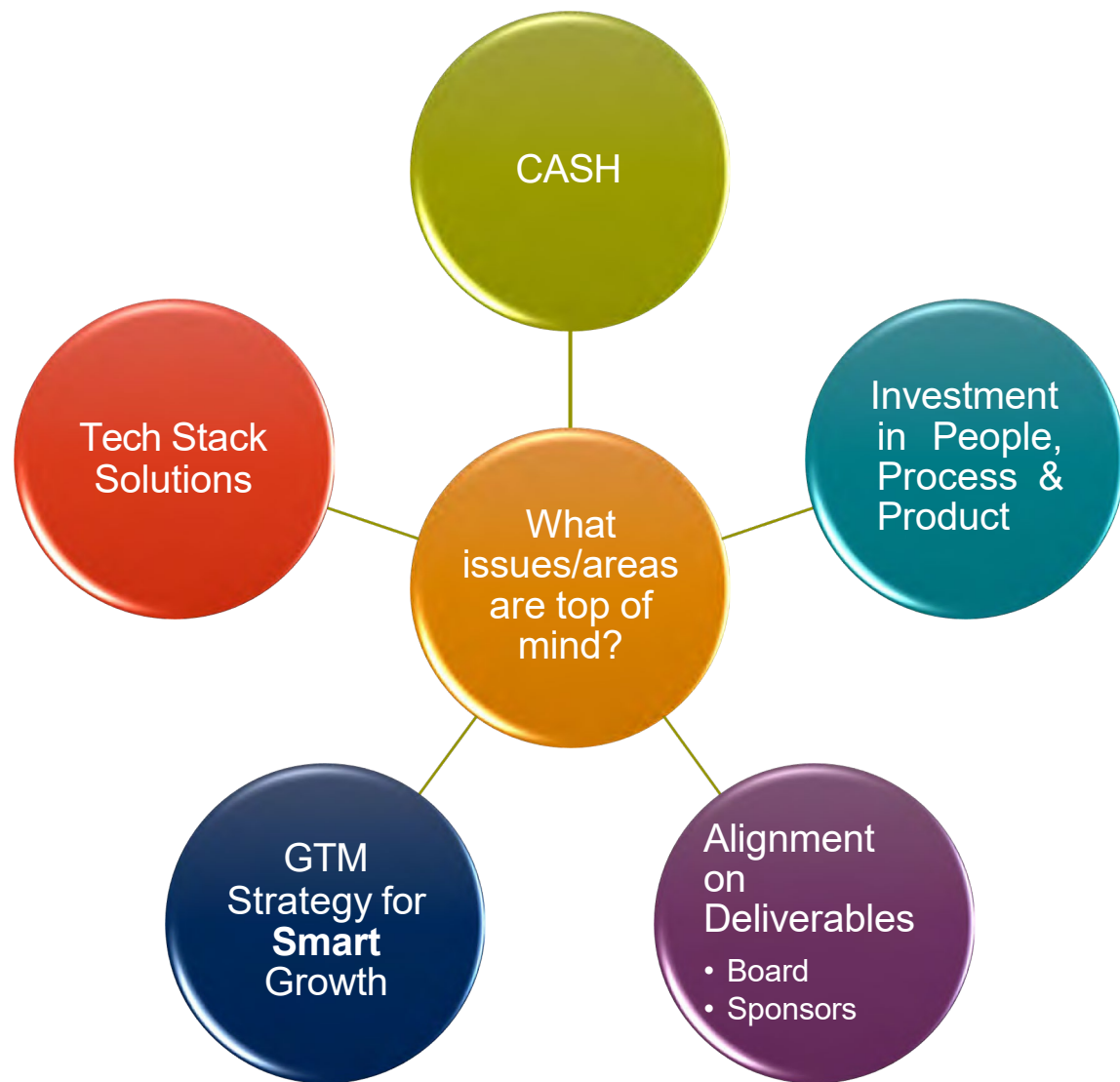
Dan Owens

CFO
Maxio

EXPLORING NEW AREAS

Agenda

- Common challenges of high-growth SaaS companies
- The Key to Customer Success – Finding the Balance
- Product Development
- AI Integration
- Signs You're Organization is Ready for the Next Stage of Growth
- When to Upgrade Your Systems
- Q&A

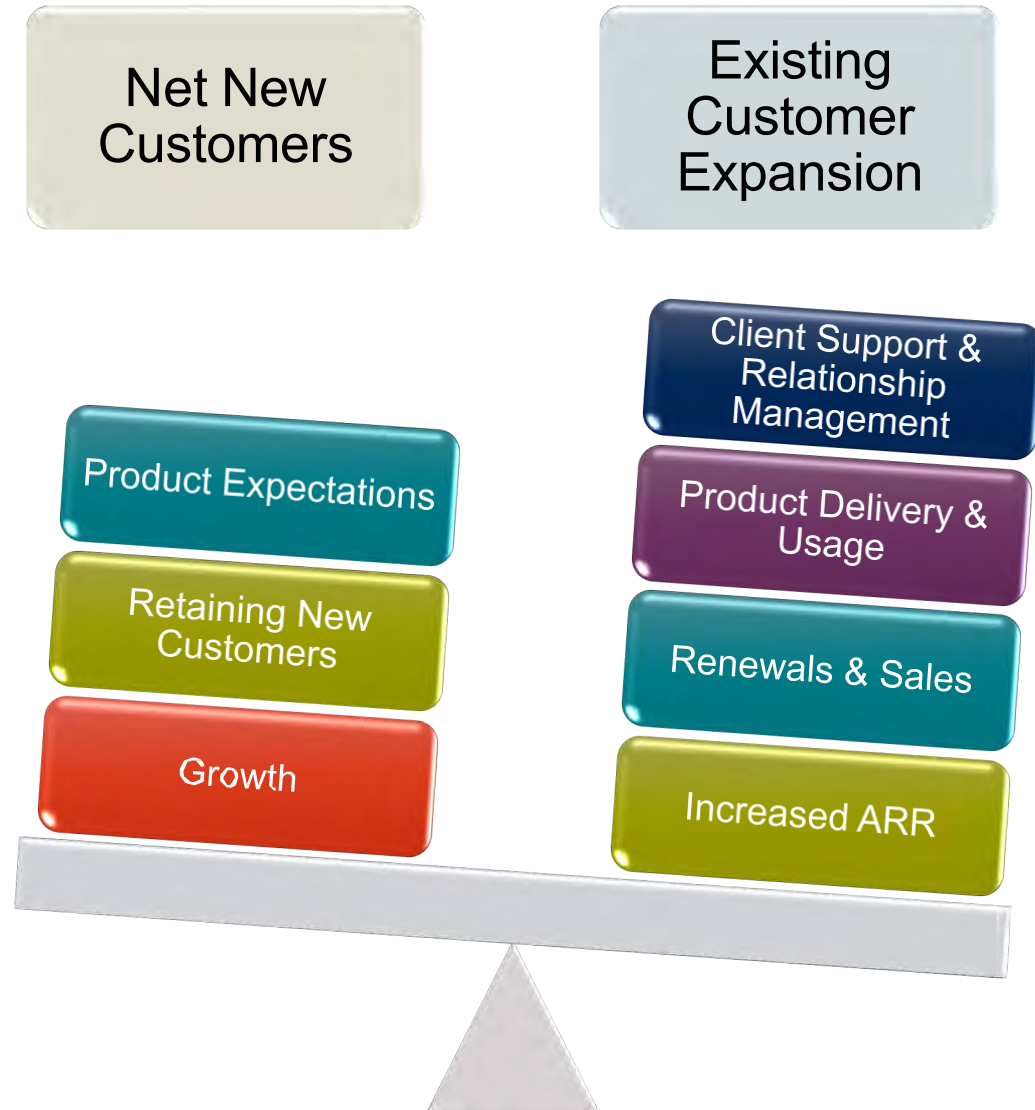


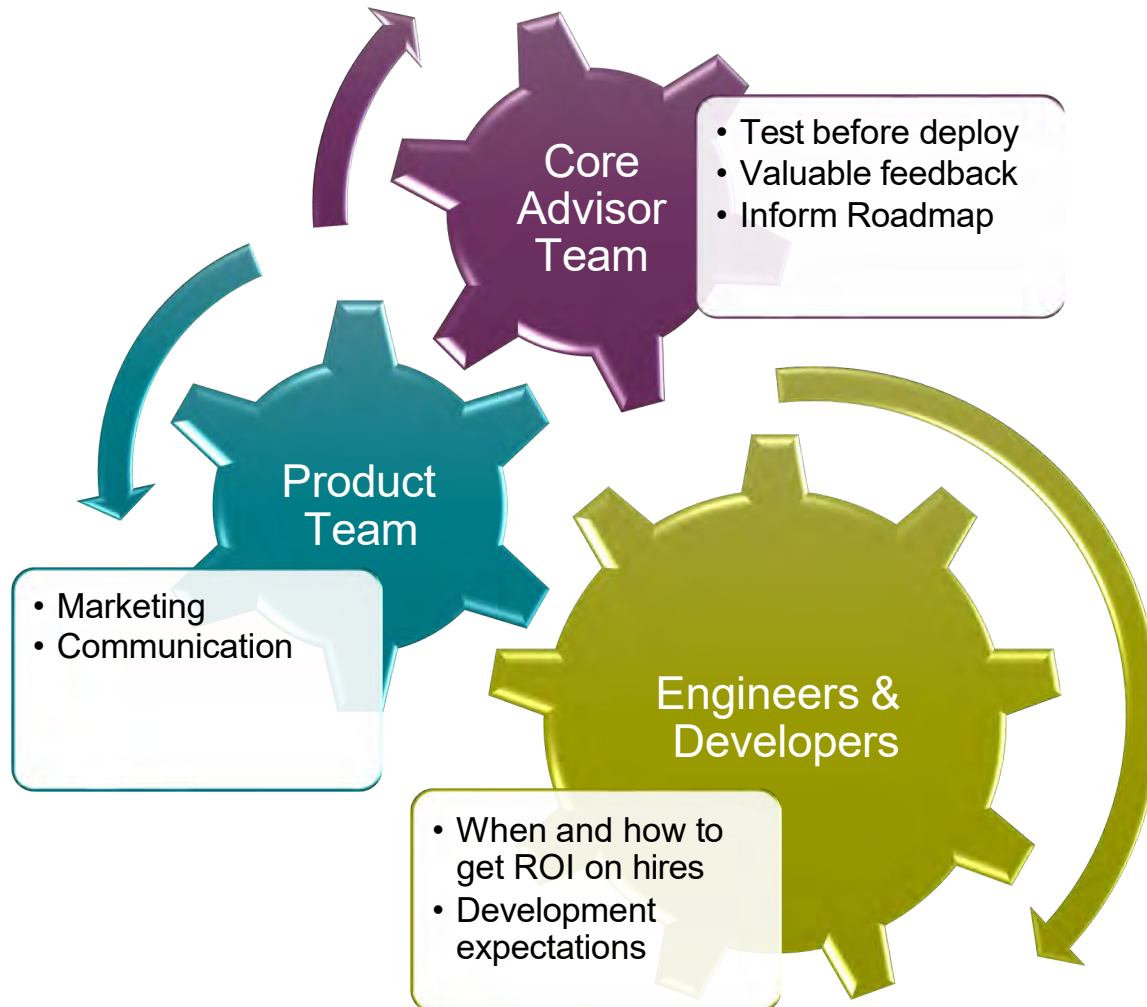
BUILT TO SCALE

Common Challenges of High- Growth SaaS Companies

BUILT TO SCALE

The Key to Customer Success – Finding the Balance



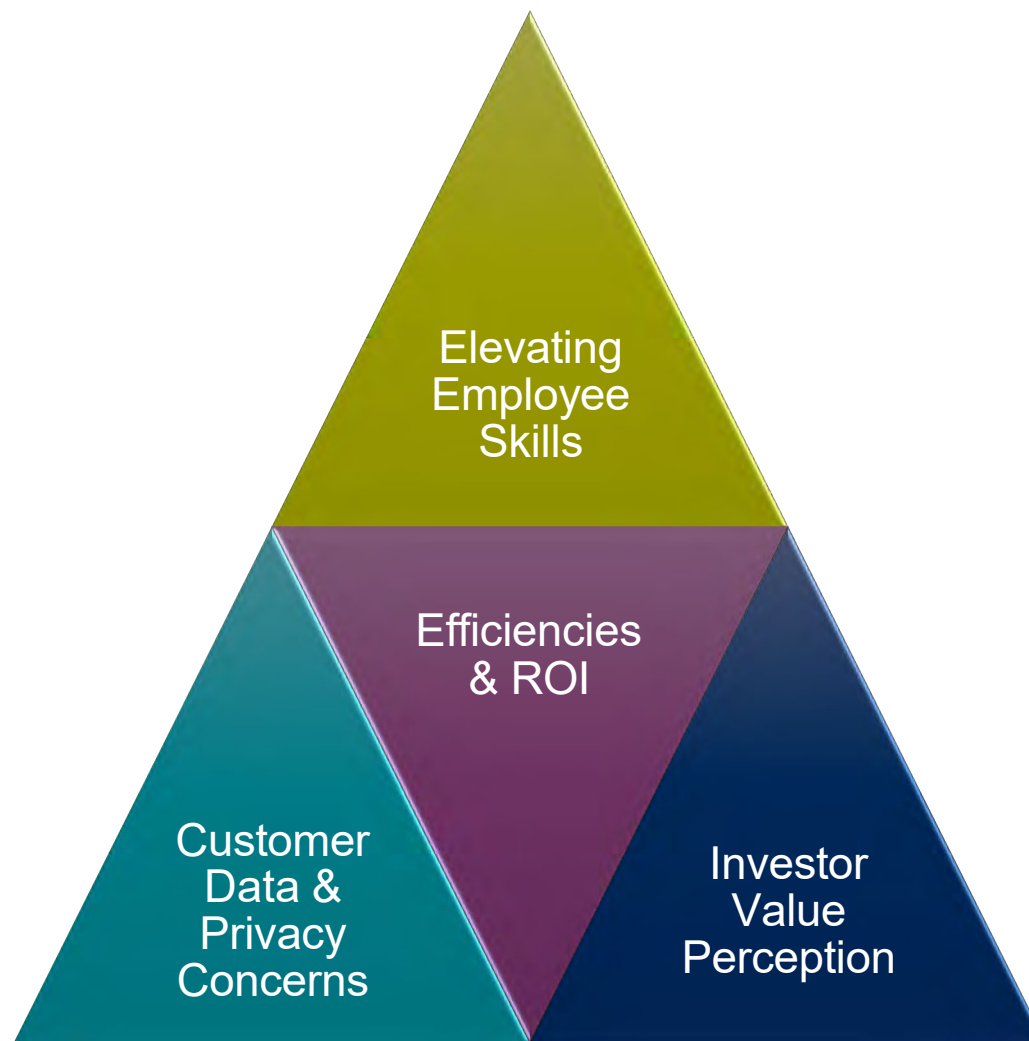


BUILT TO SCALE

Product Development

BUILT TO SCALE

Developing an AI Strategy





Command of SaaS Metrics & KPIs



Alignment Between Functional Areas of Organization



Dashboard feedback loop



People, Process & Technology

BUILT TO SCALE

Signs Your Organization is Ready for the Next Stage of Growth

BUILT TO SCALE

Key Considerations for Successful Implementations

When is it the right time to upgrade systems?

- Technology is not a magic bullet to fix all of your problems – it enhances what you're doing
- Have a clear implementation plan
- Consider potential for M&A Integration
- Plan for where you want your organization to be in 3-5 years
- Build the foundation so that when you grow into

Q&A

Thank you for
attending

Additional Questions?

Reach out to us at

Experts@armanino.com



OUR PROMISE TO YOU

Reimagine Your Potential



Unconventional Approach

We're a vested, entrepreneurial partner who sees your organization through a 360 lens and finds opportunity at every stage



Comfort in Change

Our experts provide guidance and support while quickly facilitating transformation that gives you a competitive advantage.



Focused on You

Our integrated teams and solutions deliver tailored insights to bring you more value and clarity throughout your journey.

A New and Better Way for Today and Tomorrow

Equipping you with the insights and tools needed to redefine what's possible



COMPLIANCE & REGULATORY

- Tax Planning
- Trust & Estate
- SOX
- Contract



ASSURANCE & ADVISORY

- Cybersecurity
- SOC
- Restructuring
- Revenue Recognition



STRATEGY & PLANNING

- Corporate Strategy
- Strategic Advisory
- Benchmarking
- Business Transformation



STAFFING & DEVELOPMENT

- Payroll
- Health Benefits
- Executive Search
- Interim Placement



TECHNOLOGY SYSTEMS

- ERP
- CRM
- Business Intelligence
- Managed Services



ACCOUNTING & BACKOFFICE

- Bookkeeping
- Budgeting/Forecasting
- Account Receivable
- Accounts Payable



Possible *(Re)*Defined™

Delivering impactful, bold solutions that increase clarity
and spark success for today and tomorrow.

Armanino is a brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.