POSSIBLE (RE)DEFINED

Ensuring Your SaaS Company is Built to Scale

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Certified B Corporation

A Fast-Moving Climate Requires A New Way of Thinking

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Possible (Re)Defined℠
Go further, faster

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

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AREA OF FOCUS

Digital Transformation

Ensuring Your SaaS Company Is Built to Scale

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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

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WELCOME

Today's Presenters

Scott Schimberg

Partner
SaaS Industry Leader
Armanino

Dan Owens

CFO
Maxio

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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

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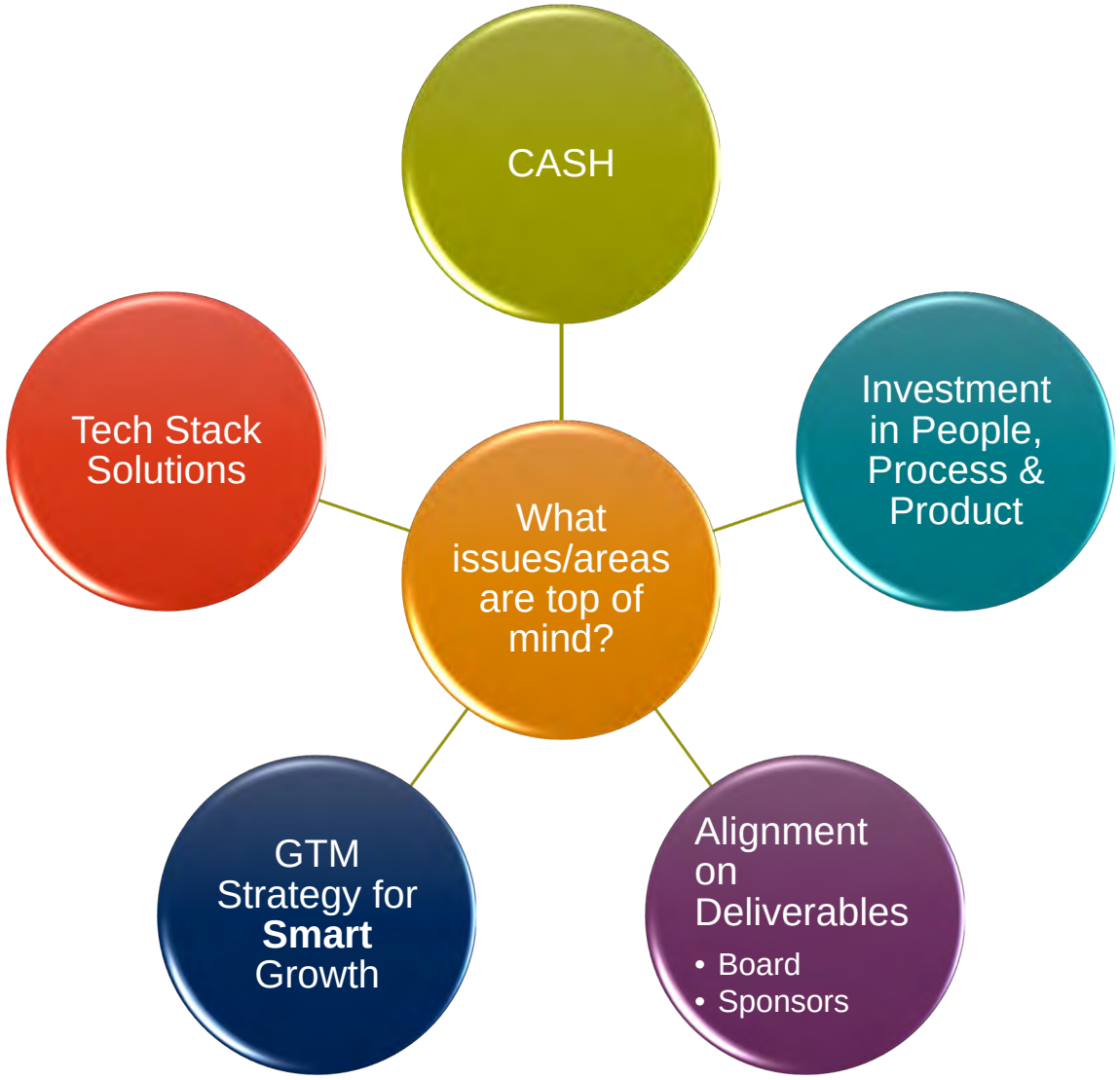

BUILT TO SCALE

Common Challenges of High-Growth SaaS Companies

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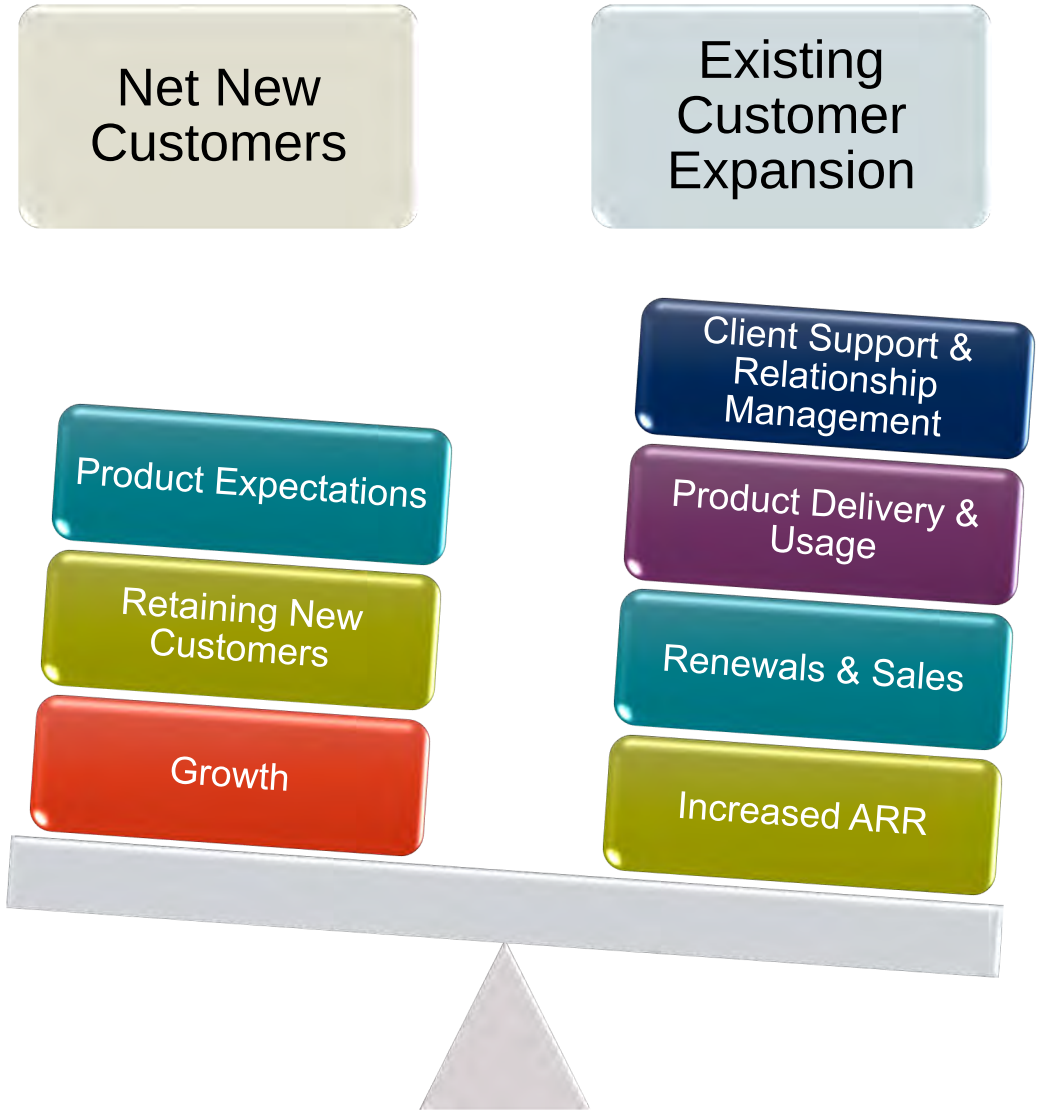
BUILT TO SCALE

The Key to Customer Success – Finding the Balance



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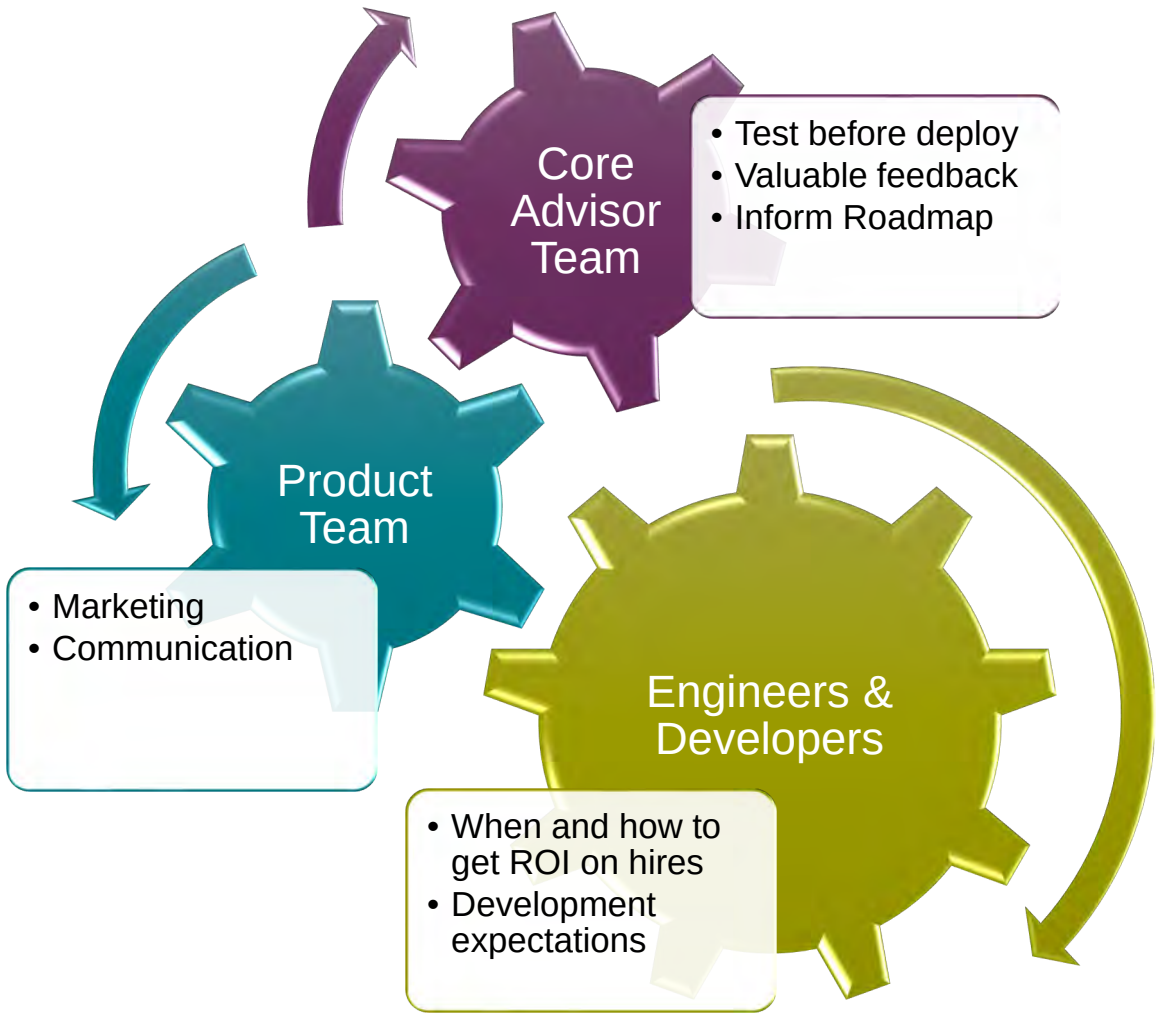

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Product Development

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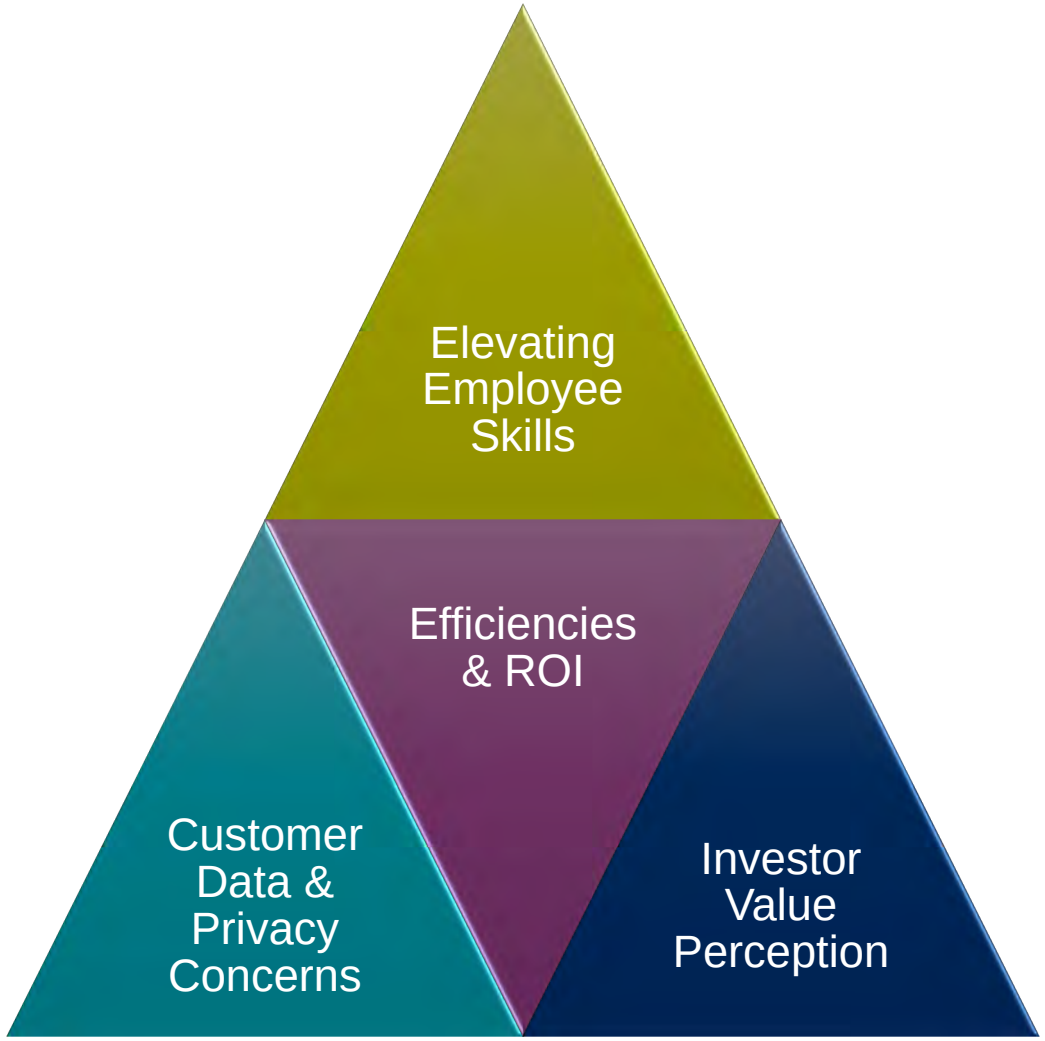
Developing an AI Strategy



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Command of SaaS Metrics & KPIs

Alignment Between Functional Areas of Organization

Dashboard feedback loop

People, Process & Technology

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Signs Your Organization is Ready for the Next Stage of Growth

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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

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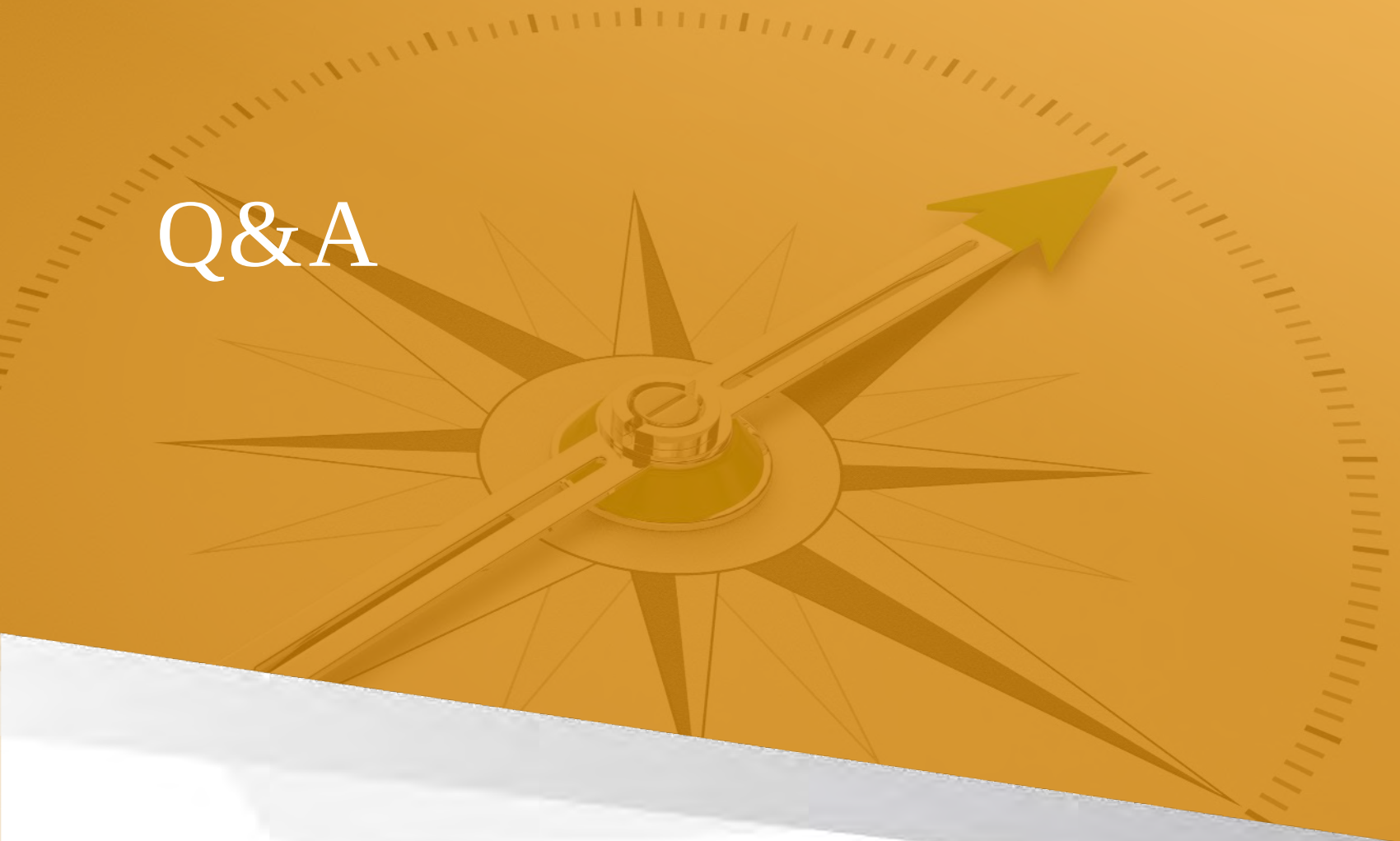
Q&A



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Thank you for attending

Additional Questions?

Reach out to us at

Experts@armaninoLLP.com

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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.

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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

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

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