



GROW WITH CONFIDENCE

SAAS METRICS FRAMEWORK: IDENTIFY THE RIGHT KPI'S FOR YOUR FIRM

Driven Insights:

Your Outsourced Finance Department

WHY DRIVEN INSIGHTS

GROW WITH CONFIDENCE

The reporting & guidance to accelerate SaaS growth



A GROWTH PARTNER WHO HAS
BEEN IN YOUR SHOES



ACCURATE FINANCIALS THAT
READ LIKE A BOOK



USEFUL INSIGHTS FOR YOUR
BUSINESS



BETTER VISIBILITY SO YOU CAN
GROW FASTER



TIGHT FINANCIAL CONTROLS AND
SYSTEMS



EXCEPTIONAL FINANCE TEAM
LESS THE STAFFING HEADACHE

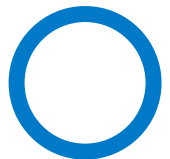
Which KPI's should I be watching right now?

...the question this framework will help you answer



Growth Stage

Find which growth stage you're in and read the goal for that stage (slides 6 & 7)



Metric Type

Review each metric type (cash, profit, growth & market share) and select the metrics that have been flagged as being relevant to your growth stage (slides 8-14) as well as any that support your unique goals (eg: raising next round of capital, achieving certain thresholds of growth or an exit).



Create Your KPI Shortlist

Whittle that list down to a logical shortlist of metrics that will support your current phase goal.*



*Don't forget finance fundamentals like cash position and revenue recognition.

KPI Focus

Cash

Profit

Growth

Market
Share

We have categorized KPIs across 2 sets of criteria for easier identification and to avoid overlooking relevant metrics

Product/Market Fit

Refine Sales

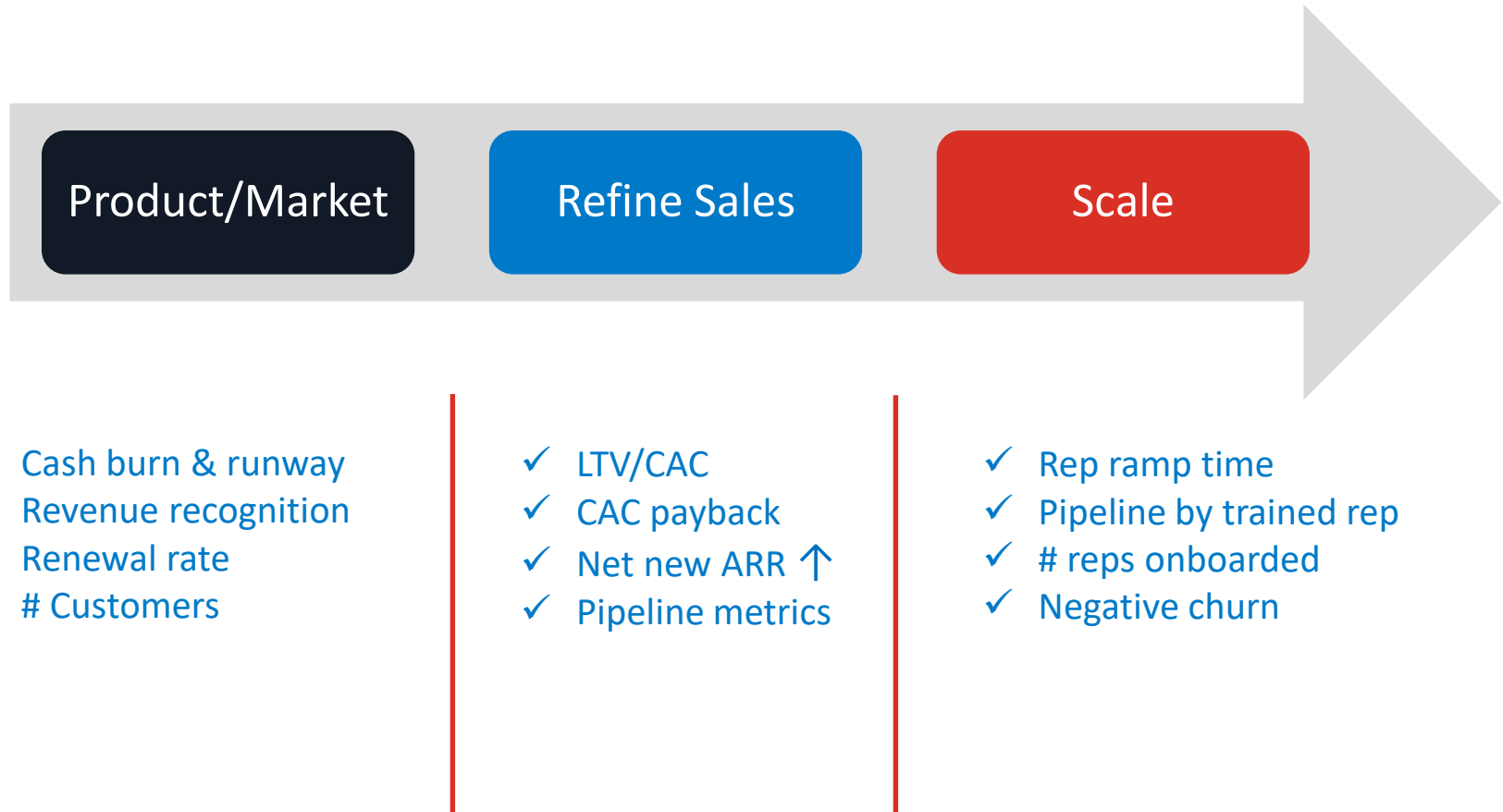
Scale

Growth Phase

TOP KPI'S FOR EACH STAGE

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Many KPIs are used in more than one phase and KPI usage will vary by company, but here are the KPIs tied closest to each phase's goals. [Use this as starting point to navigate framework.](#)



Distinct objectives and challenges in each phase.

3 PHASES OF SAAS GROWTH

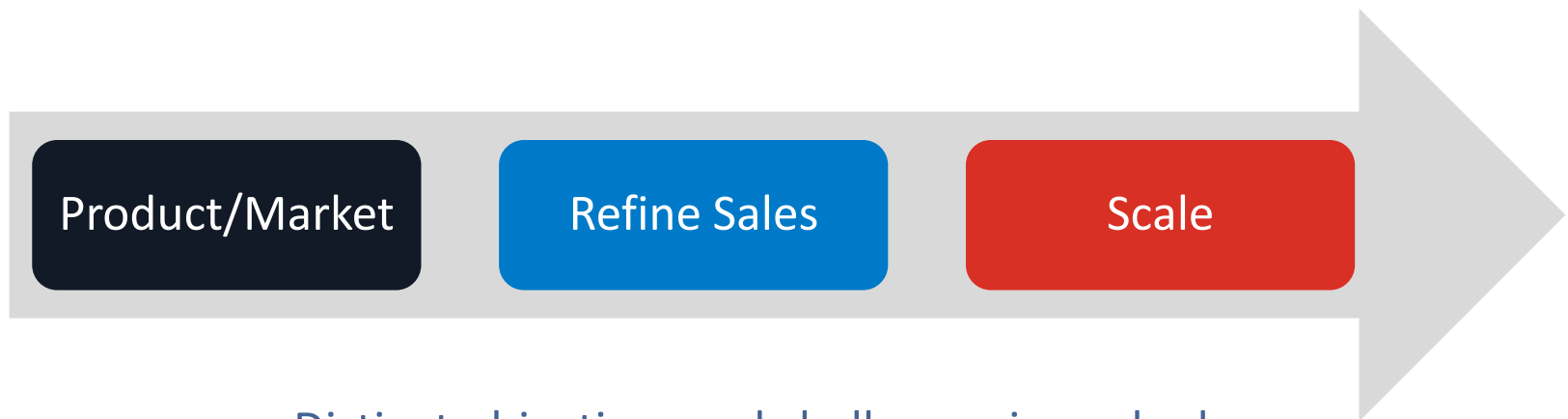
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3 Phases of a Young SaaS Business. Tackle in order, NOT in parallel.

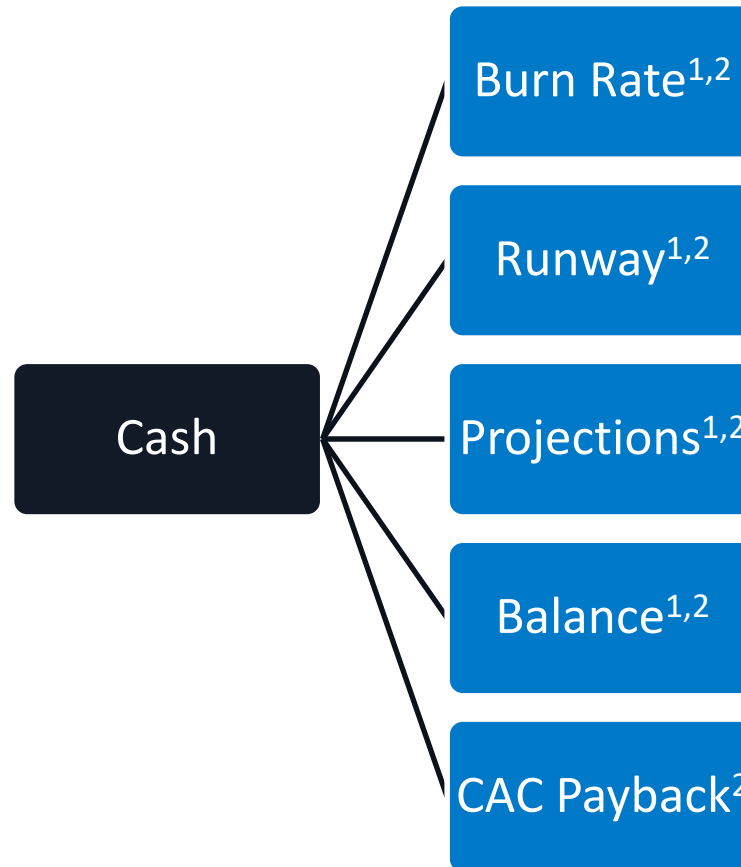
01 Goal: Attain Product/market fit.

02 Goal: Build repeatable, profitable, scalable sales process.

03 Goal: Aggressively scale the sales engine.



Distinct objectives and challenges in each phase.



¹ Phase I, ² Phase II, ³ Phase III.

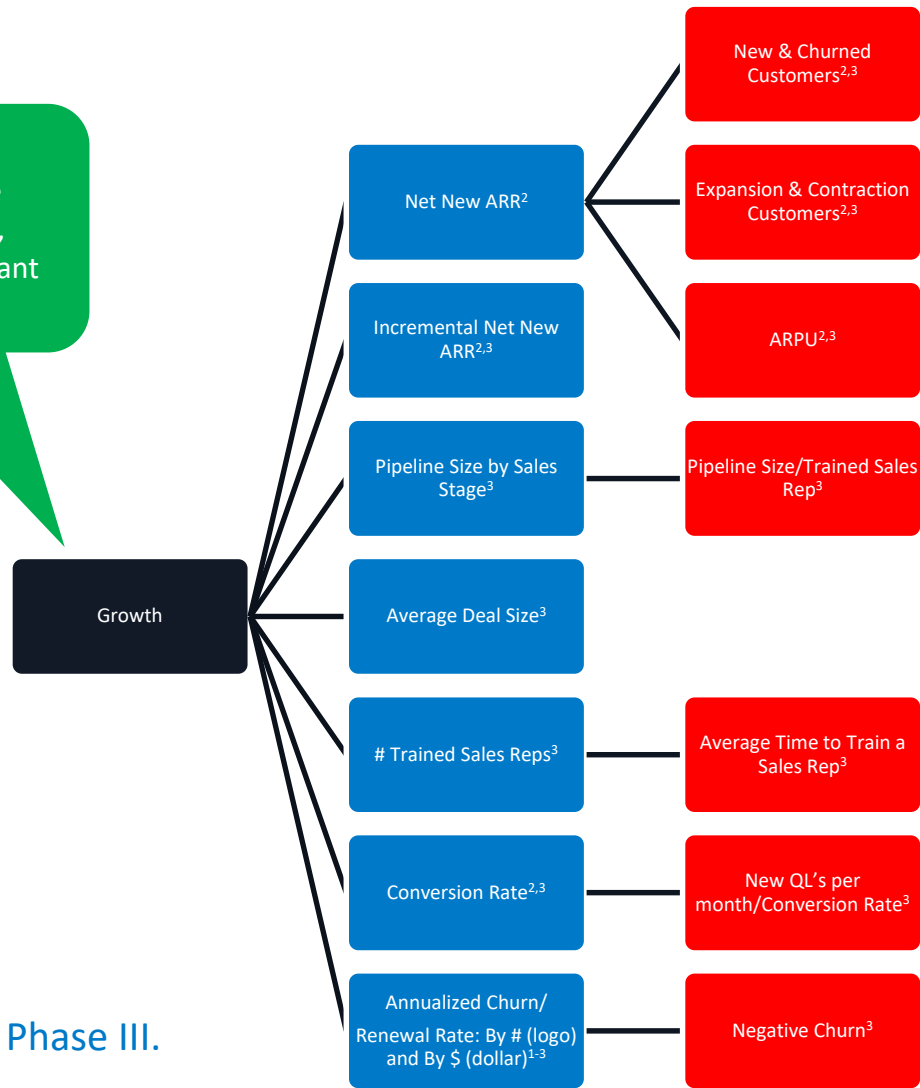
Many KPIs are useful in multiple phases, but be selective. It's not practical or advisable to watch all KPIs.

KPI FRAMEWORK: GROWTH

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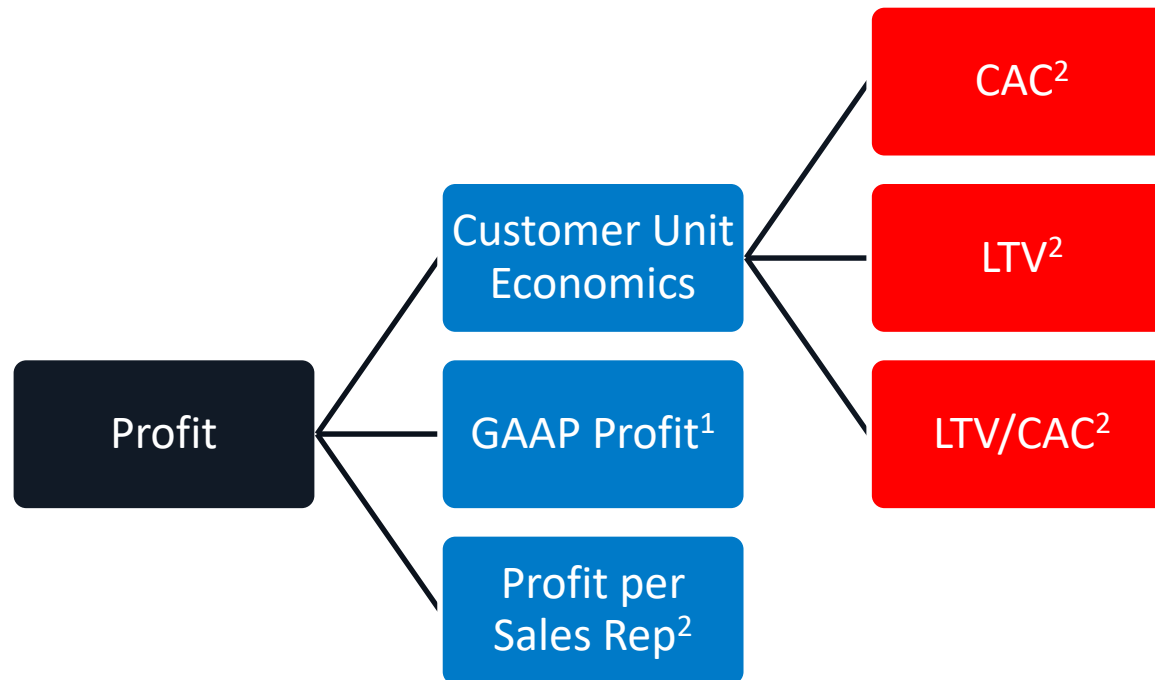
Be sure to:

1. Show KPI change over time
2. Segment reports by cohort, product, industry, other relevant segments.



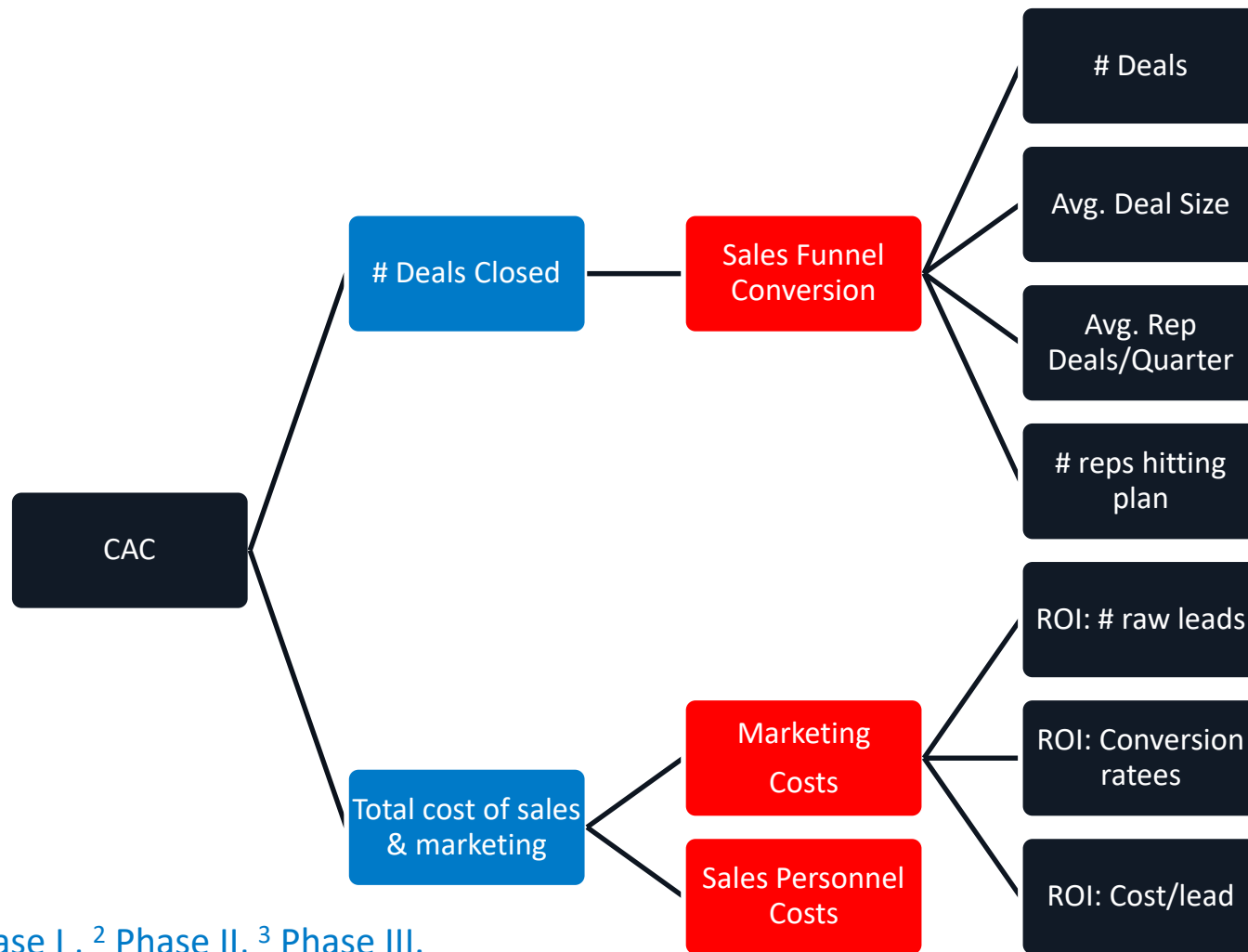
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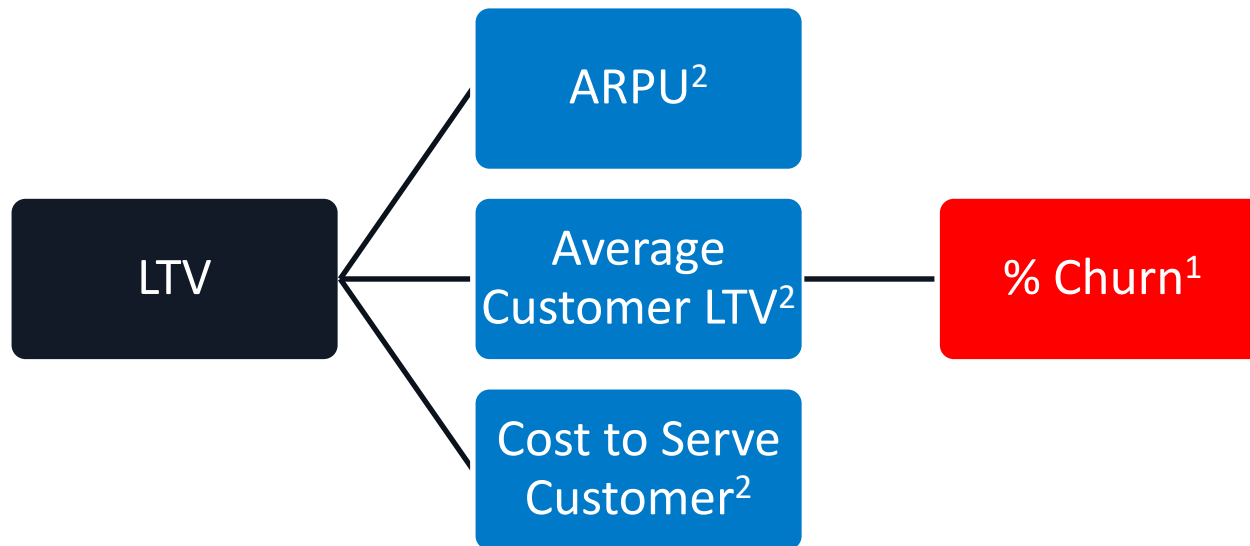
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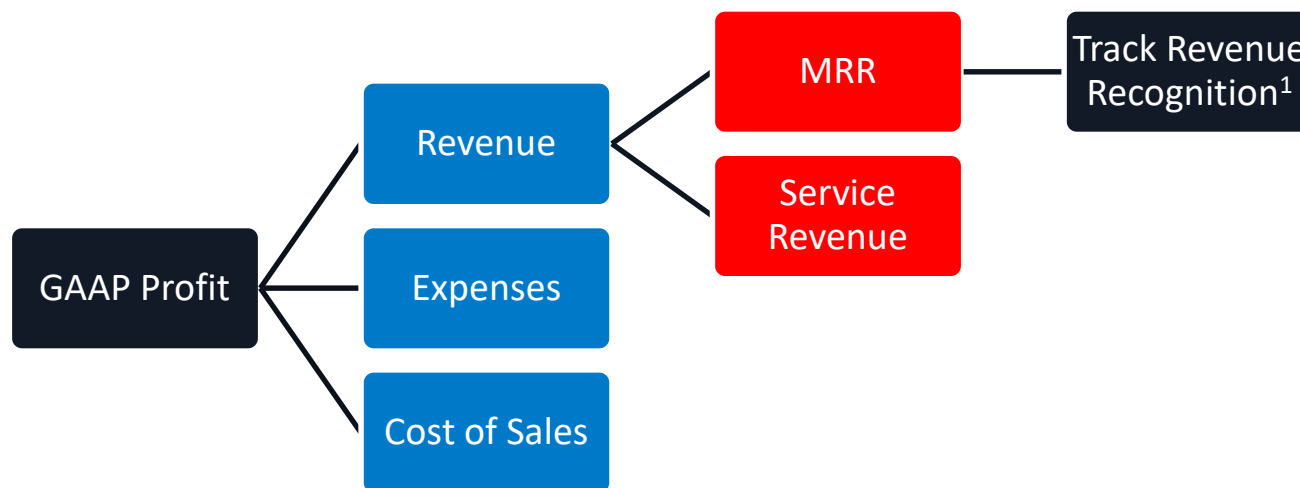
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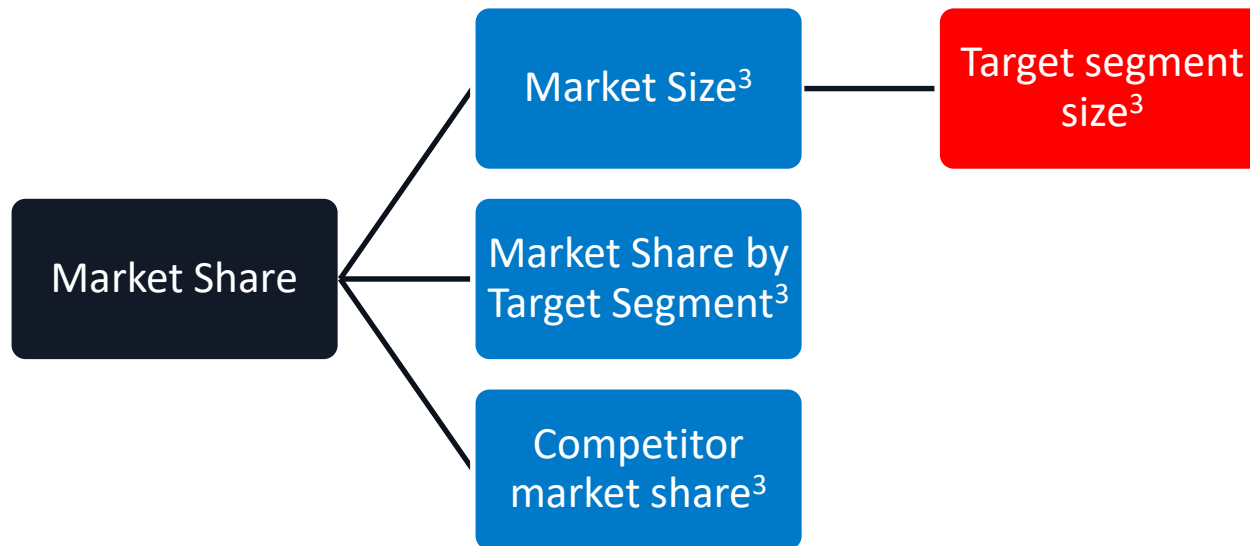
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1. CAC: Customer acquisition cost
2. LTV: Customer lifetime value
3. ARR: Annual recurring revenue
4. ARPU: Average monthly revenue per customer
5. Churn: Customer who doesn't renew subscription
6. Renewals: Customer who renews subscription
7. QL: Qualified lead. MQL (marketing), SQL (sales).

Reference: Please note [David Skok's blog](#) has always served as a resource for us and for this framework.

Happy to Help. If finding the right metrics remains elusive, not a problem. We get it, there's a lot to it and we're here to lend a hand. Sometimes it just takes a nudge in the right direction.

For a little extra guidance, email info@driveninsights.com (or call [888-631-1124](tel:888-631-1124)) with answers to the below questions and we'll be in touch with our thoughts. Don't worry, we won't charge you. **If we can quickly help, it's on the house!**



OUTSOURCED SAAS FINANCE FUNCTION GROW WITH CONFIDENCE

YOUR CHALLENGES

Lost confidence in accuracy of your financial reports?

Tired of making key business decisions in the dark?

Desperate to increase your billable time and spend less on admin, without compromising the quality of information you need to manage your firm?

Losing sleep because systems aren't in place to prevent fraud and catch errors?

Tired of the headaches that come with attracting, retaining and managing a bookkeeper and/or controller?

OUR SOLUTION - OUTSOURCE YOUR FINANCE FUNCTION:

- Permanently end your financial frustrations. We handle it all.
- Get accurate, timely reports that mean something to you
- Receive ongoing reporting tailored to your SaaS business
- Better inform your decisions to grow faster, build more value that the market will ultimately reward at exit

**Schedule
Free Consultation**

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888-631-1124

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