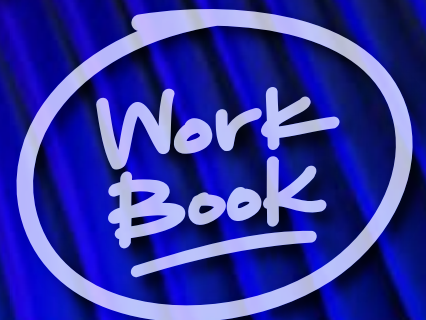


S A A S B O A R D R O O M

SAAS BOARDROOM INTENSIVE



F E B R U A R Y 2 0 2 5





THIS WORKBOOK BELONGS TO:

What are your biggest wins?

What's working well now?

What do you want out of the next two days?

		ACTIONS		
PG. 9 HOW TO STEP BACK SO YOUR SALES TEAM CAN ACTUALLY LEAD WITH KYLE VAMVOURIS	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. <div></div> Value \$: _____	2. <div></div> Value \$: _____	3. <div></div> Value \$: _____
PG. 17 ROOTS & WINGS: LESSONS FROM THE TOP 100 ENTREPRENEURIAL FAMILIES ON EARTH WITH SCOTT DONNELL	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. <div></div> Value \$: _____	2. <div></div> Value \$: _____	3. <div></div> Value \$: _____

		ACTIONS		
PG. 25 THE ULTIMATE FINANCIAL MODEL WITH JOSH AHARONOFF	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. <div></div> Value \$: _____	2. <div></div> Value \$: _____	3. <div></div> Value \$: _____
PG. 41 NOURISHING YOUR DESTINY WITH DR. KEVIN PRESTON	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. <div></div> Value \$: _____	2. <div></div> Value \$: _____	3. <div></div> Value \$: _____

WHO'S AT MY TABLE?

DAY 1

NAME	COMPANY NAME	CONTACT	NOTES

WHO'S AT MY TABLE?

DAY 2

NAME	COMPANY NAME	CONTACT	NOTES



SAAS BOARDROOM



WELCOME
DAY 1

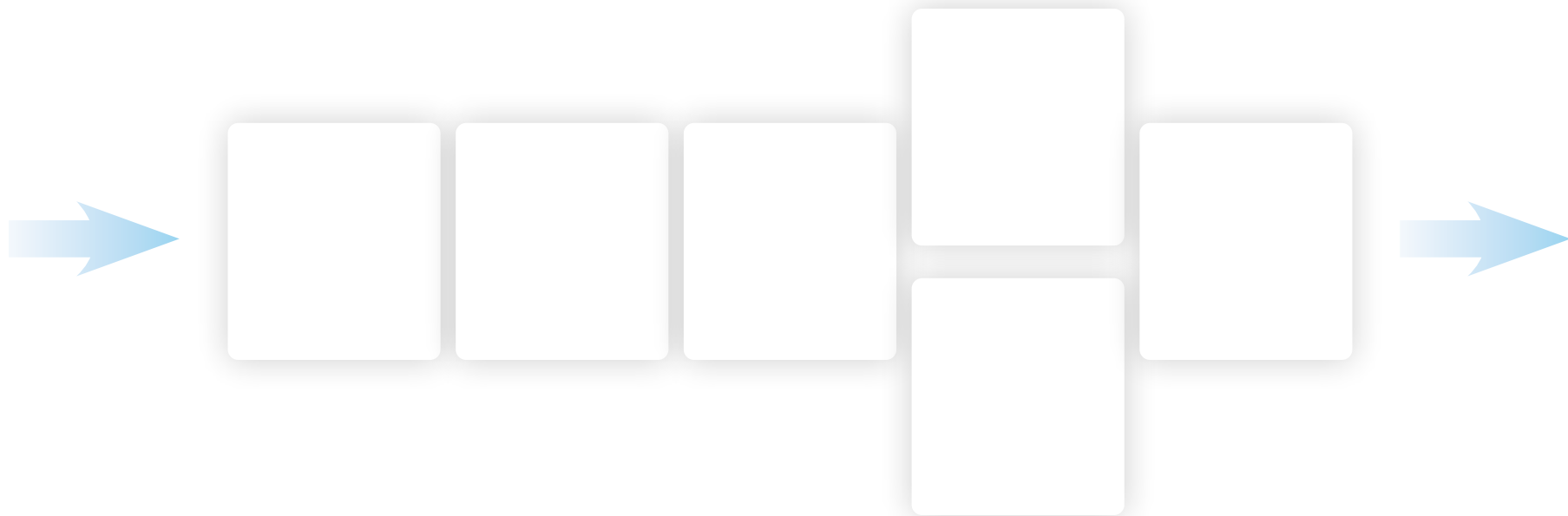
SAAS BOARDROOM INTENSIVE

HOW TO STEP BACK SO YOUR SALES TEAM CAN ACTUALLY LEAD

WITH KYLE VAMVOURIS

ACTIVITY TO OUTCOME PLANNER

DEAL FLOW AUDIT



The image displays four vertical panels of dot grid paper, arranged side-by-side. Each panel is a white rectangle with a uniform grid of small, light gray dots. The panels are separated by thin, dark gray vertical lines. The first panel on the left is the widest, while the other three are of equal, narrower widths. All panels have the same height and dot density.

Notes

COLLECT INSIGHTS

Takeaways

CREATE PLAN

I Add your Actions to the Capture Cards at the beginning of this workbook.

FOCUS	IDEAS	ACTIONS
1.		
2.		
3.		



SAAS BOARDROOM

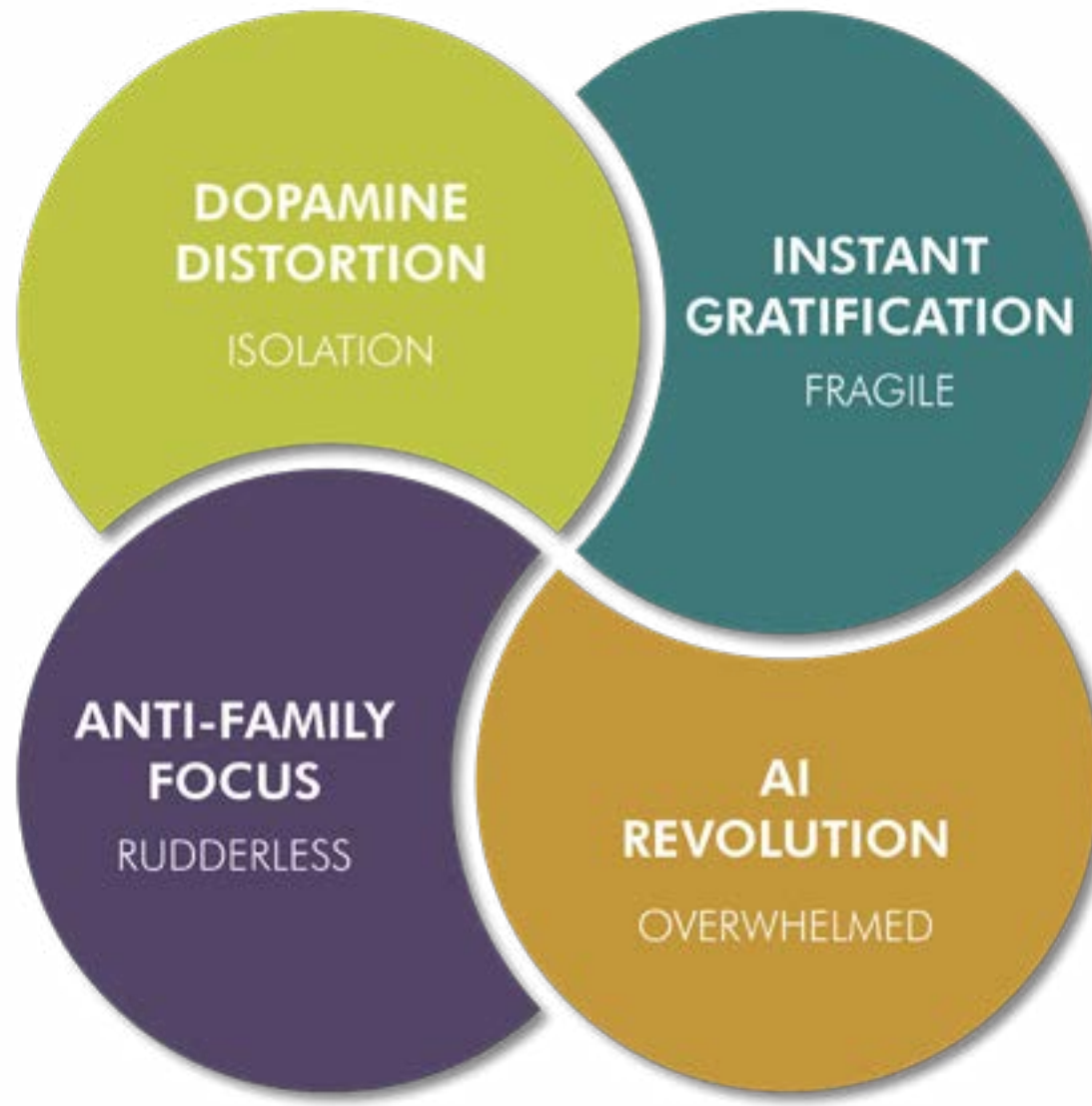


SAAS BOARDROOM INTENSIVE

**ROOTS & WINGS:
LESSONS FROM
THE TOP 100
ENTREPRENEURIAL
FAMILIES ON EARTH**

WITH SCOTT DONNELL

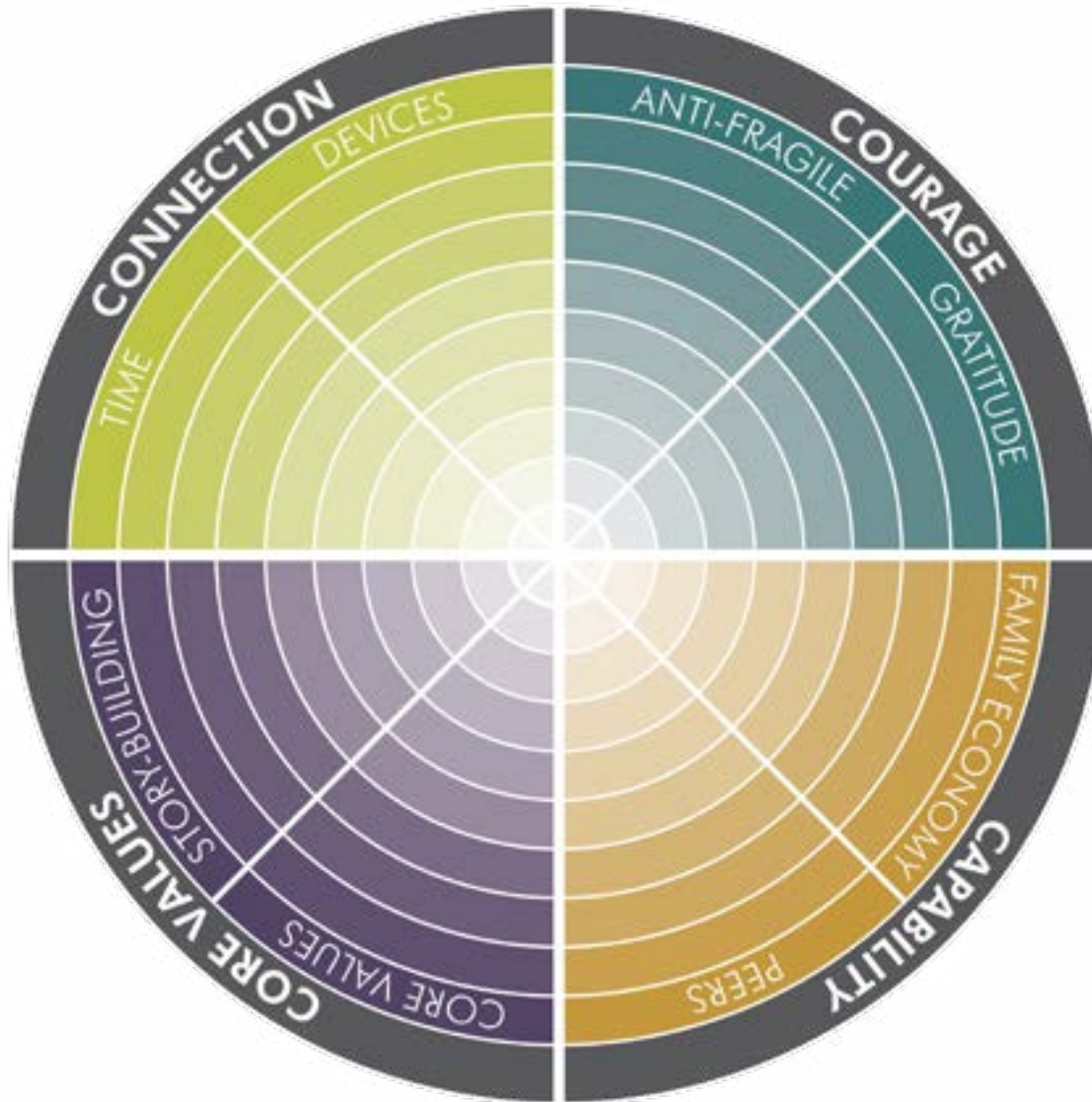
4 FORCES



ROOTS & WINGS



LEGACY WHEEL



Notes

COLLECT INSIGHTS

Takeaways

CREATE PLAN

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FOCUS	IDEAS	ACTIONS
1.		
2.		
3.		



SAAS BOARDROOM



SAAS BOARDROOM INTENSIVE

WELCOME
DAY 2

THE ULTIMATE FINANCIAL MODEL

WITH JOSH AHARONOFF



Connect your Data to the **Ultimate Financial Model**
www.modelwiz.com/saasacademy

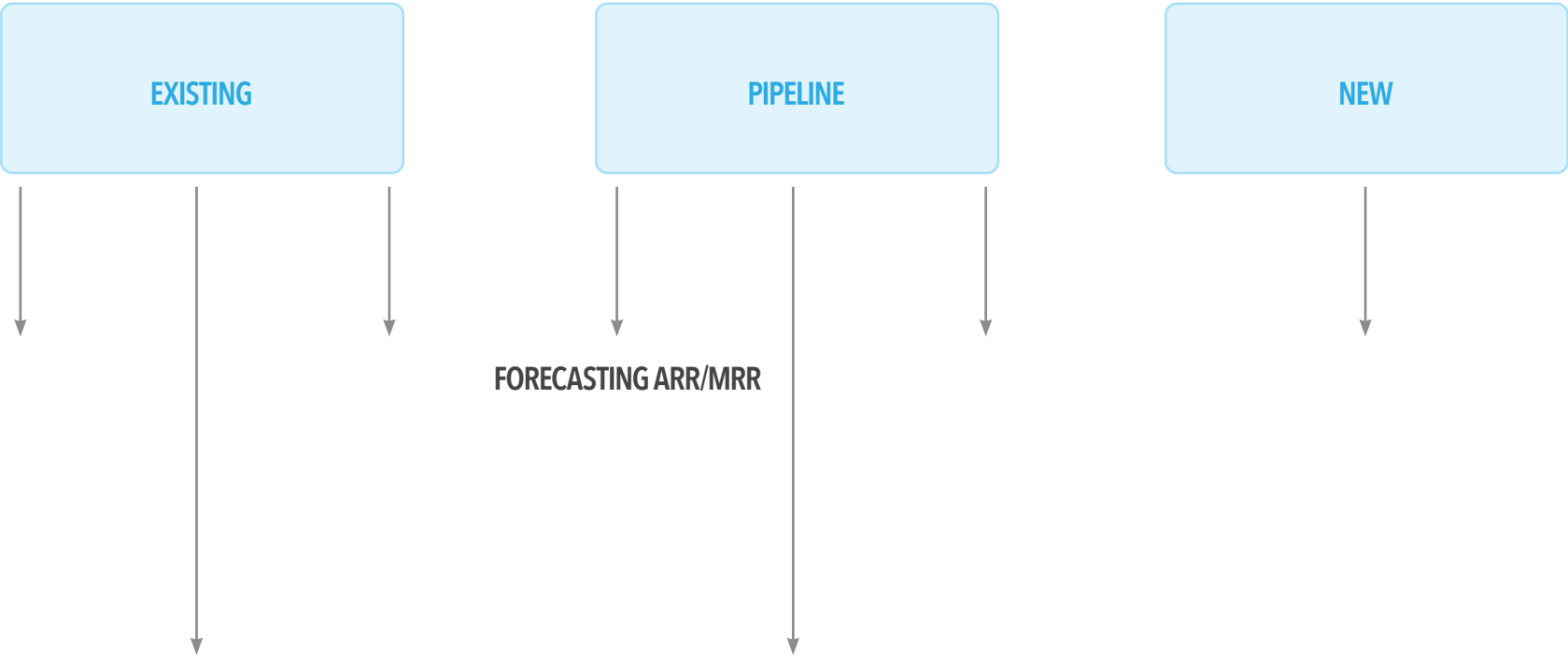
THE ULTIMATE FINANCIAL MODEL



4 STAGES OF FINANCIAL MODELING



REVENUE



ACQUISITION




Forecast Revenue Template
www.modelwiz.com/saasacademy

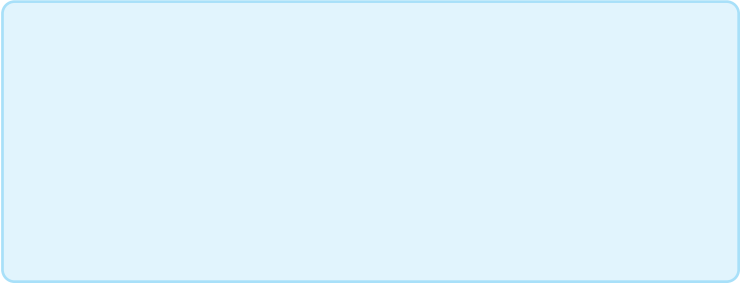
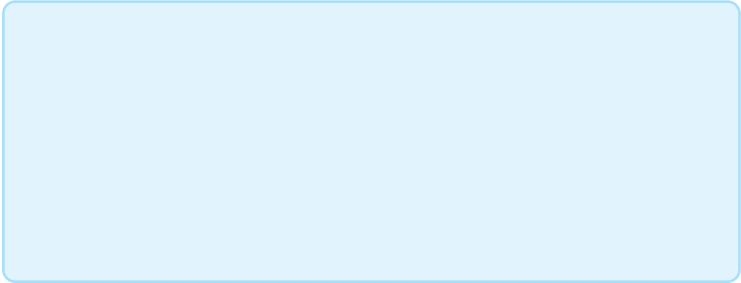

SALES REPS



DIGITAL REPS



PARTNERSHIPS



FORECAST MRR/ARR



Forecast MRR/ARR Template
www.modelwiz.com/saasacademy

		← HISTORICAL		PROJECTION →	
		MONTH 1	MONTH 2	MONTH 3	
%					
\$\$		100,000	120,000		
		20,000	20,000		
		-1,000	-2,400		
		8,000	10,000		
		-2,000	-1,800		
		120,000	145,000		

FORECASTING HEADCOUNT



Forecast Headcount Template
www.modelwiz.com/saasacademy

+

=

--	--	--	--	--

DEPARTMENT 1	DEPARTMENT 2	DEPARTMENT 3

FORECASTING THE P&L

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
OFFICE SUPPLIES												
PROFESSIONAL FEES												
TRAVEL AND ENTERTAINMENT												

FORECAST THE BALANCE SHEET

B	<hr/> + -	<hr/> + -
A		
S	<hr/> + -	<hr/> + -
E		

FINANCIAL SUMMARY



Pitch Deck Template
www.modelwiz.com/saasacademy

	2024	2025	Q1	Q2	Q3	JAN	MAR	APR
PROFIT AND LOSS								
BALANCE SHEET								
CASHFLOW								



CURRENT PERIOD

VS

PRIOR PERIOD

BUDGET VS ACTUALS



Budget vs Actuals Template
www.modelwiz.com/saasacademy

REVENUE				
COST OF GOODS SOLD				
GROSS PROFIT				
OPERATING EXPENSE				
EBITDA				
NET OTHER INCOME				
NET INCOME				
CASH FLOW				
ENDING CASH				
ANNUAL RECURRING REVENUE				

Notes

COLLECT INSIGHTS

Takeaways

CREATE PLAN

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FOCUS	IDEAS	ACTIONS
1.		
2.		
3.		



SAAS BOARDROOM

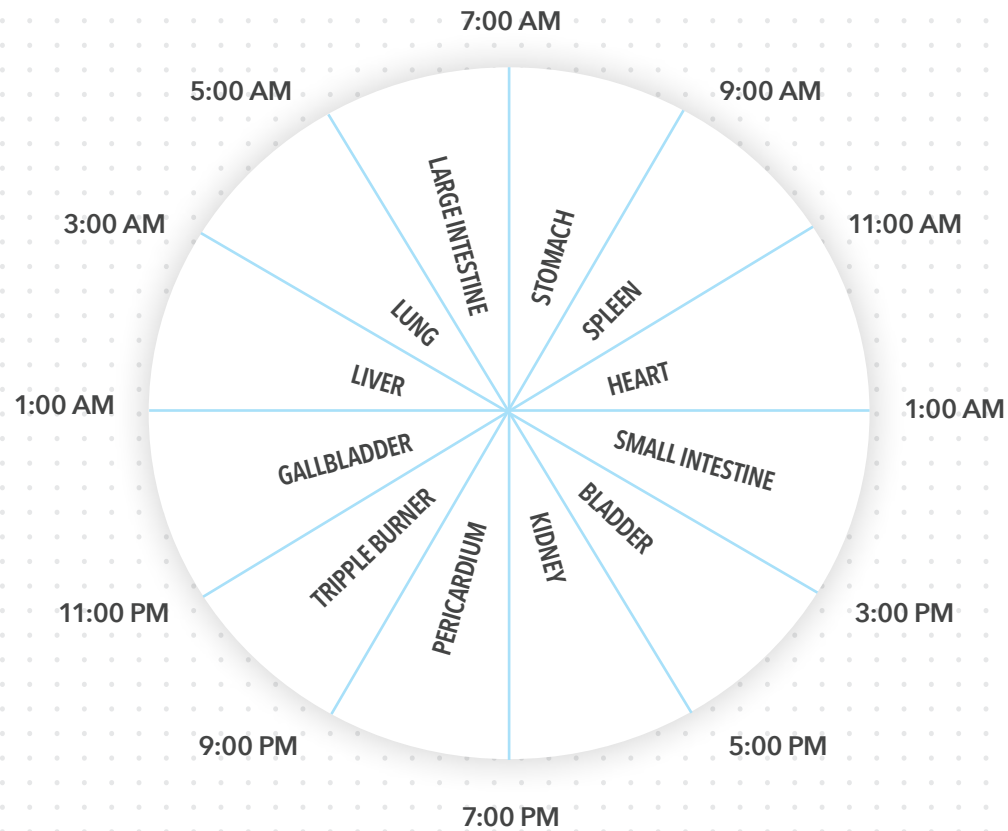


SAAS BOARDROOM INTENSIVE

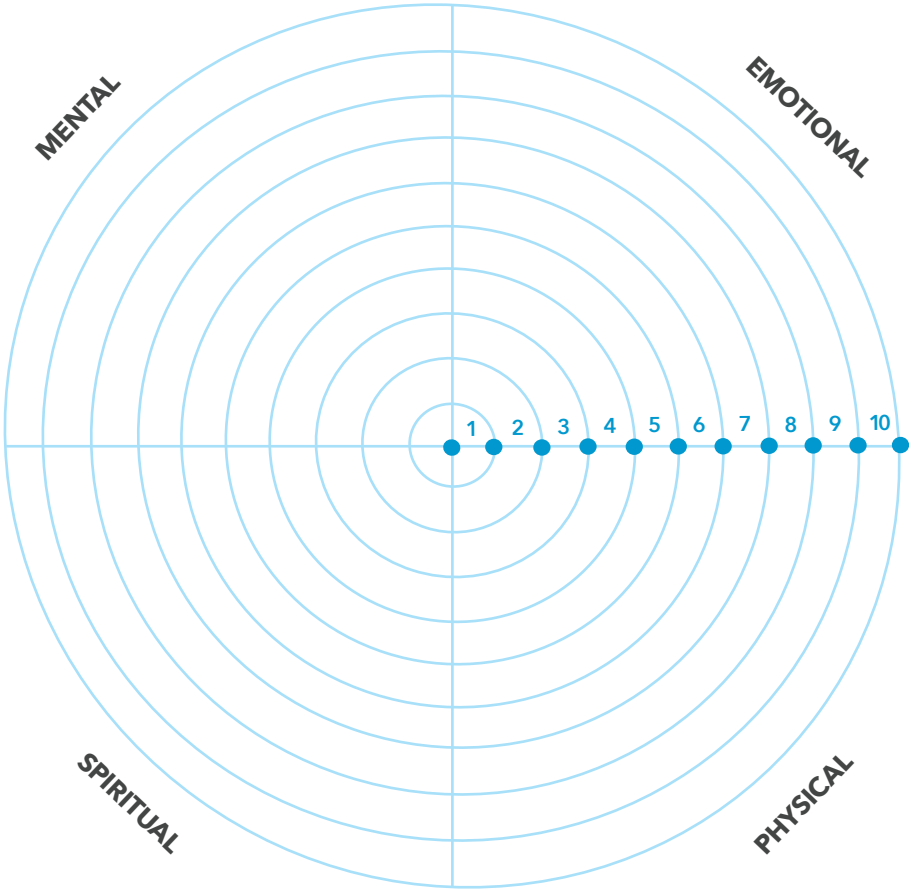
NOURISHING YOUR DESTINY

WITH DR. KEVIN PRESTON

TCM BODY CLOCK



RESOURCE BALANCE



RESOURCE BUCKETS

MENTAL RESOURCES		MENTAL RESOURCE GAPS	
	SOCIAL CONNECTIONS		
	TIME IN NATURE		
	SLEEP		
	JOY TIME		
	EATING CLEAN HEALTHY FOOD		
	DRINKING CLEAN WATER		
	MEDITATION / RELAXATION PRACTICE		
	HAVING / SETTING / ACHIEVING GOALS		
	TIME WITH FAMILY		
	GRATITUDE PRACTICE		
	FULFILLING CAREER / LIFE PATH		

RESOURCE BUCKETS

EMOTIONAL RESOURCES		EMOTIONAL RESOURCE GAPS	
	SLEEP		
	REGULAR EXERCISE		
	SUPPORT NETWORK		
	KNOWN VALUES / PRIORITIES		
	SELF-COMPASSION		
	SELF-CARE PRACTICES		
	MASSAGE		
	THERAPY		
	SOCIAL CONNECTIONS		
	LEARNING / STUDENT MINDSET		
	GENEROSITY PRACTICE		

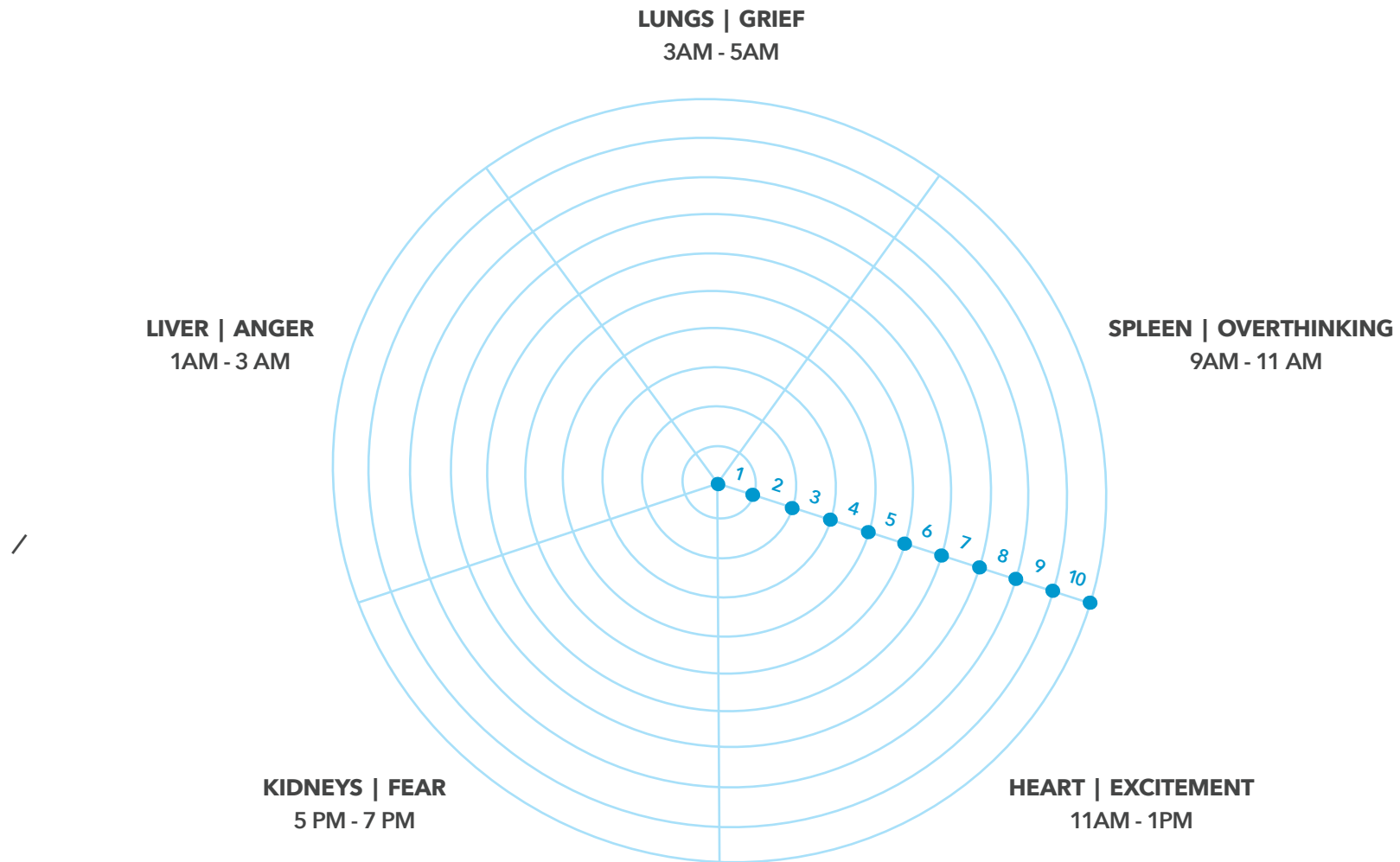
RESOURCE BUCKETS

SPIRITUAL RESOURCES		SPIRITUAL RESOURCE GAPS	
	BELIEF IN A TRANSCENDENT LIFE FORCE		
	SHARED FAITH COMMUNITY		
	MEDITATION		
	PRAYER		
	TIME IN NATURE		
	FOSTERING YOUR GIFTS		
	GRATITUDE PRACTICE		
	DREAM JOURNALING		
	AFFIRMATIONS		
	LOVING CONNECTIONS		
	PRESENCE PRACTICE		

RESOURCE BUCKETS

PHYSICAL RESOURCES		PHYSICAL RESOURCE GAPS	
	SLEEP		
	EATING GOOD CLEAN FOOD		
	DRINKING CLEAN WATER		
	DAILY MOVEMENT		
	MEDITATION		
	MODERATE TOXIN CONSUMPTION		
	ALCOHOL ETC. MODERATION		
	MANAGING STRESS		
	MODERATE SCREEN TIME		
	MODERATE SITTING TIME		
	FUN, PHYSICAL ACTIVITY		

YIN ORGANS



Notes

COLLECT INSIGHTS

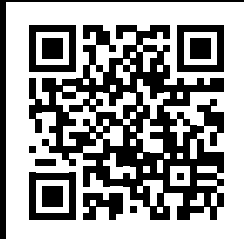
Takeaways

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2. <div></div>	<div></div> <div></div> <div></div>	<div></div>
3. <div></div>	<div></div> <div></div> <div></div>	<div></div>

FEEDBACK



Feedback is a gift. Please take a min to **share your thoughts** with us so we can continue improving our events for you.

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JUNE 22-24, 2025 | NEW ORLEANS

NEXT EVENT



Register for the SaaS Boardroom
Intensive in New Orleans:

www.saasacademy.com/brd



SAAS BOARDROOM

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