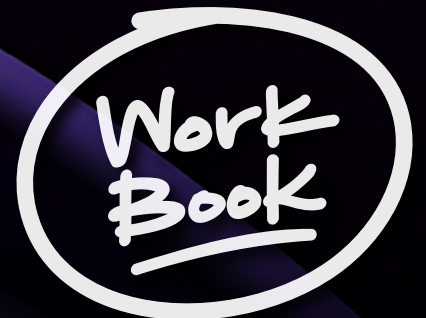


SAAS BOARDROOM INTENSIVE



J U N E 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 THE ADAPTATION ADVANTAGE: HOW HIGH PERFORMERS CAN THRIVE IN AN ERA OF CHANGE WITH DR. GREG WELLS	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. _____ Value \$: _____	2. _____ Value \$: _____	3. _____ Value \$: _____
PG. 15 CREATING ENTERPRISE VALUE THROUGH MARKETING: LESSONS LEARNED FROM WORKING WITH LEADING PE FIRMS & SCALING THEIR PORTFOLIO COMPANIES WITH SHIV NARAYANAN	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. _____ Value \$: _____	2. _____ Value \$: _____	3. _____ Value \$: _____

		ACTIONS		
PG. 23 YOUR ORG CHART IS YOUR GROWTH STRATEGY WITH MARK BRADLEY	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. _____ Value \$: _____	2. _____ Value \$: _____	3. _____ Value \$: _____
PG. 33 LEANER, FASTER, BIGGER: THE PARTNER ADVANTAGE WITH FRANZ-JOSEF SCHREPF	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. _____ Value \$: _____	2. _____ Value \$: _____	3. _____ Value \$: _____
PG. 41 L&L BROUGHT TO YOU BY HOW TO SAAS EXIT SMART: PREPARING FOR PE ON YOUR TERMS HOSTED BY SHIV NARAYANAN	<input type="checkbox"/> Now <input type="checkbox"/> Later Project: _____ Owner: _____	1. _____ Value \$: _____	2. _____ Value \$: _____	3. _____ 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



WELCOME
DAY 1

SAAS BOARDROOM INTENSIVE

THE ADAPTATION ADVANTAGE: HOW HIGH PERFORMERS CAN THRIVE IN AN ERA OF CHANGE

WITH DR. GREG WELLS

Notes

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 INTENSIVE

**CREATING ENTERPRISE
VALUE THROUGH
MARKETING: LESSONS
LEARNED FROM WORKING WITH
LEADING PE FIRMS & SCALING
THEIR PORTFOLIO COMPANIES**

WITH SHIV NARAYANAN

MARKETING PYRAMID OF SOPHISTICATION

Give your company a score out of 5 for its performance in the following areas:

4. OUTCOME

REVENUE GROWTH
____/5

3. RESOURCING

REVENUE OPERATIONS
____/5

TEAM & BUDGET
____/5

2. PROGRAMS

CUSTOMER MARKETING
____/5

CONTENT
____/5

DEMAND GENERATION
____/5

1. FOUNDATION

TAM & SEGMENTATION
____/5

PRODUCT MARKETING
____/5

SALES ENABLEMENT
____/5

GO-TO-MARKET STRATEGY
____/5

MARKETING SCORECARD

Add up your scores to give a total out of 45. Where does your company's score rank on the following scorecard?

SOPHISTICATION SCORE	MATURITY LEVEL	YOUR SCORE
<25	LOTS OF MARKETING WORK NEEDED	
25-30	NASCENT MARKETING	
30-35	AVERAGE	
35-40	SOME SOPHISTICATION	
>41	SOPHISTICATED MARKETING ENGINE	

MARKETING FOCUS BY BUSINESS MODEL

Which channels should your company be focusing on based on your ACV?

ACV	PAID MEDIA	SEO	ABM	CUSTOMER MARKETING	PRODUCT MARKETING	CORPORATE MARKETING	MARKETING OPS	SALES ENABLEMENT
< \$1K								
\$1-10K								
\$5-50K								
\$50-300K								
\$300K+								

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SAAS BOARDROOM INTENSIVE

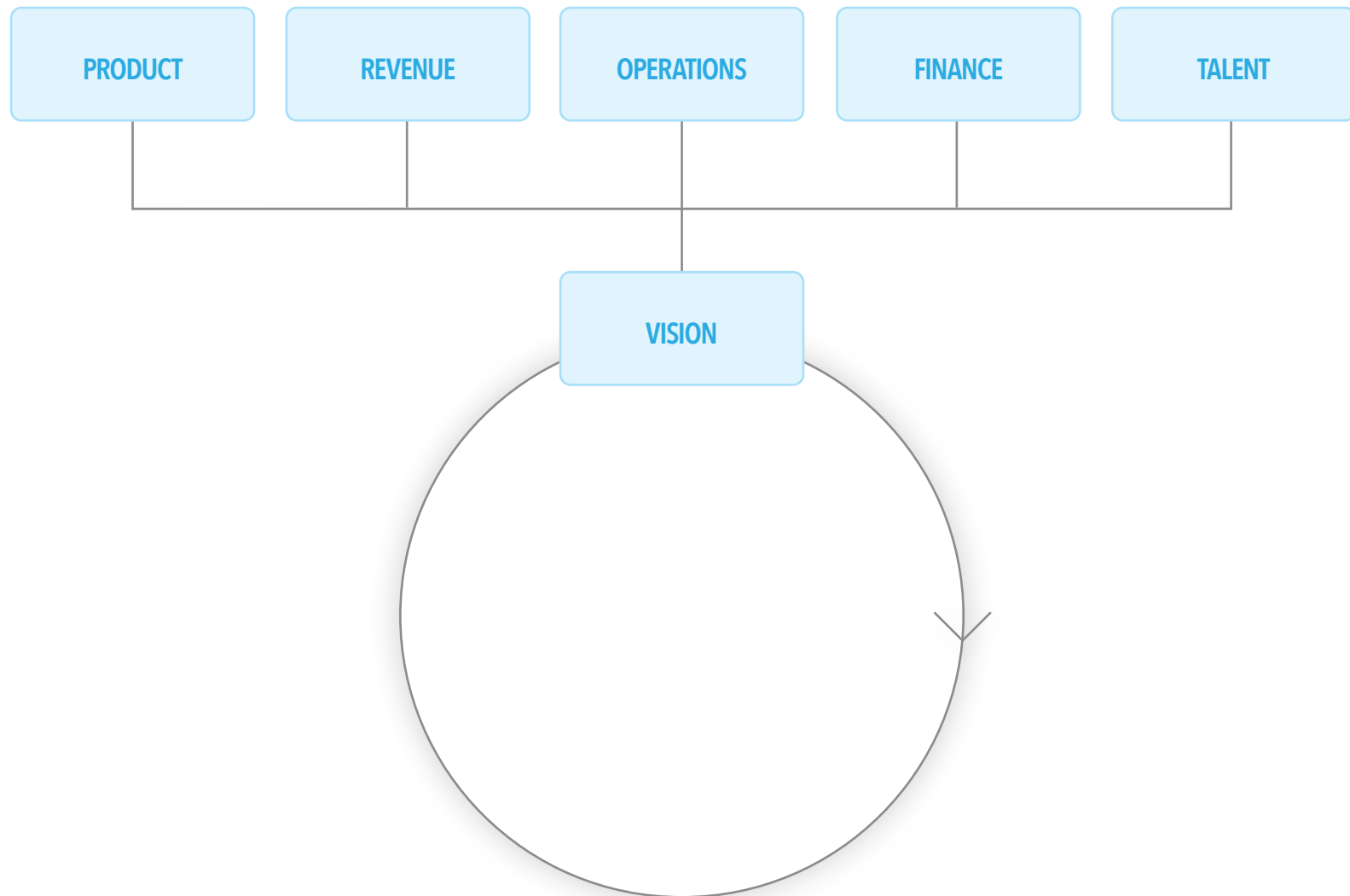
WELCOME
DAY 2

YOUR ORG CHART IS YOUR GROWTH STRATEGY

WITH MARK BRADLEY

GROWTH STRATEGY MODEL

YOUR ORG CHART IS YOUR GROWTH STRATEGY



MEETING CADENCE: THE RHYTHM THAT RUNS THE ORG CHART

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ORG CHART BUILDER

Use this page to draft your future-facing org chart. Start with the 5 core seats and assign current or future leaders to each.

SEAT	CURRENT OWNER	FUTURE OWNER	NOTES
PRODUCT			
REVENUE			
OPERATIONS			
FINANCE			
TALENT			
CHIEF VISION OFFICER (YOU)			

ACCOUNTABILITY MAP

List 1-3 key responsibilities for each seat. This helps define what 'ownership' truly means in each lane.

SEAT	KEY RESPONSIBILITIES
PRODUCT	
REVENUE	
OPERATIONS	
FINANCE	
TALENT	
VISION	

WEEKLY SCORECARD BUILDER

Assign 1 core metric per seat. These are your leading indicators of health and ownership.

SEAT	WEEKLY SCORECARD METRIC	WHY THIS MATTERS
PRODUCT		
REVENUE		
OPERATIONS		
FINANCE		
TALENT		
VISION		

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2.		
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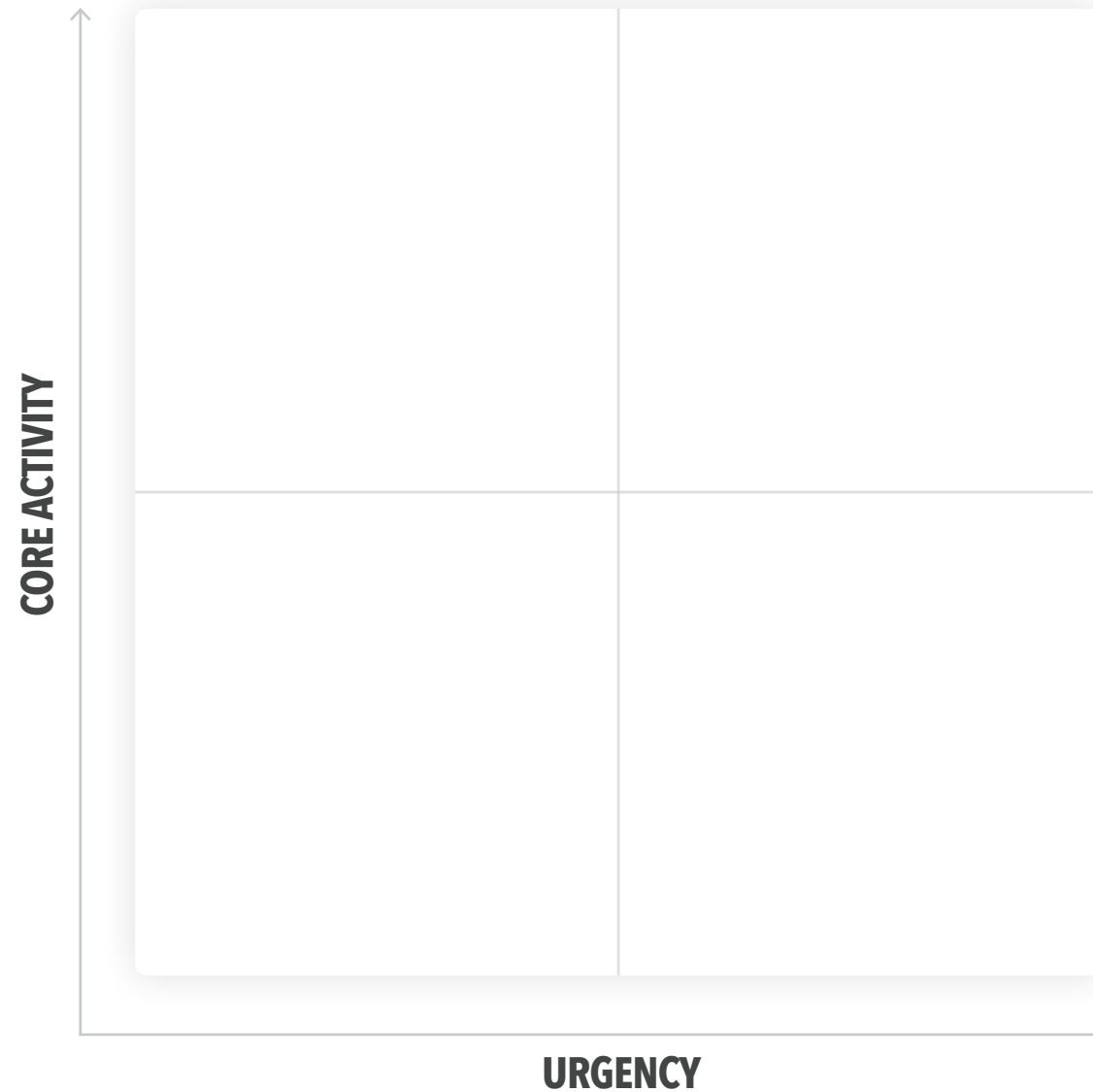
LEANER, FASTER, BIGGER: THE PARTNER ADVANTAGE

WITH FRANZ-JOSEF SCHREPF

THE 5 TYPES OF PARTNERSHIPS



YOUR BUILD, BUY, PARTNER STRATEGY



HOW TO VET YOUR PARTNERS

--	--	--	--

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FOCUS	IDEAS	ACTIONS
1.		
2.		
3.		



SAAS BOARDROOM INTENSIVE

LUNCH & LEARN BROUGHT
TO YOU BY **HOW TO SAAS**

EXIT SMART: PREPARING FOR PE ON YOUR TERMS

HOSTED BY SHIV NARAYANAN

COLLECT INSIGHTS

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1.		
2.		
3.		

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