SLATE POINT PARTNERS

Slate Point Partners 2024

The Quality of Revenue Assessment Model

Accelerating Value Creation in Private Equity

Whitepaper

About The Authors

We are a team of seasoned revenue operations experts and hands-on operating executives. We've founded, managed, and successfully exited companies. We understand that the private equity landscape is evolving rapidly and getting deals done is becoming increasing complex. That's why we believe quantifying and benchmarking revenue operations capabilities are key to assessing revenue health, identifying growth potential and understanding operational risk.

Managing Partner

Steve Busby

Steve has over 30 years of experience operating and advising small and mid-sized companies to help them achieve transformational growth.

Partner

Bernard Taracevicz

Bernie is a hands-on operator with expertise in growing VC-funded startups, Fortune 500 companies, and Private Equity owned businesses.

Partner

Josh McDonald

Josh is a serial entrepreneur across real estate and technology. He has expertise in helping companies scale their revenue teams, systems, and operations.

Board Advisor

Steve Diorio

Stephen is an established authority in revenue operations, commercial transformation, revenue acceleration, and sales and marketing performance management.

Key Takeaways

The Rise In Undeployed Capital

$3.7 Trillion

The industry is sitting on a stockpile of undeployed capital, equating to $3.9 trillion in dry powder, the largest share of it ($1.2 trillion) in buyout funds. The pressure to deploy capital has never been greater.

The Rise In Competition

3x

The proliferation of PE entities, coupled with the scarcity of attractive deals, has intensified the battle for assets and pressure to deliver outsized returns.

Financial Engineering Is Not Enough

75%

Leaders recognize that financial engineering is only the first step toward generating value and will account for just 25% of their efforts. They believe the remaining 75% should focus on operational value creation.

Traditional Analysis Are Insufficient

1/4

Backward looking financial analysis only account for 25% of the total earnings picture and provide little visibility into the causal chain of events that leads to revenue growth and future cash flow, or the keys that underlie firm value.

A Holistic Model For Value Creation

360 Degree

Quality of Revenue provides a holistic lens through which investors can examine the robustness of a company's revenue capabilities.

Coverage Across The Deal Cycle

100%

Assessing Quality of Revenue at key points in the deal cycle helps investors and management teams make informed strategic decisions, optimize operations, and align investments toward sustainable revenue growth

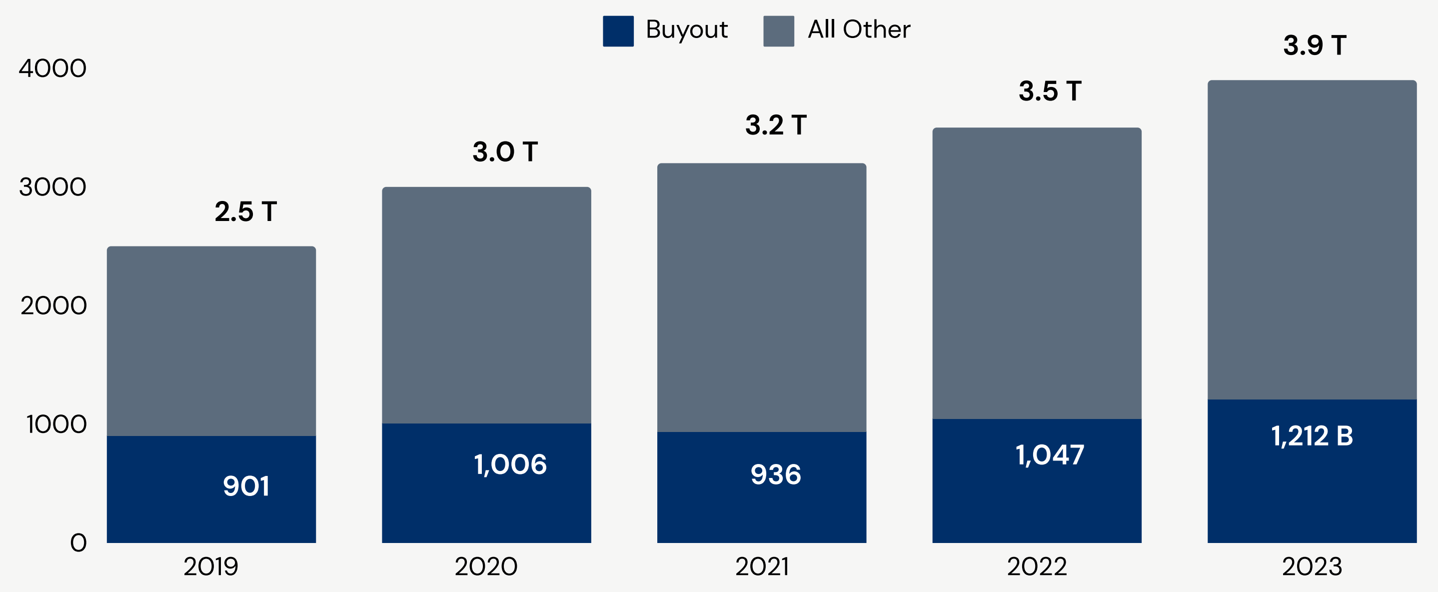
The Investment Landscape Is Changing

With record levels of undeployed capital ($3.7 Trillion globally), elevated interest rates and a halt in mergers, acquisitions and IPOs – PE investors must contend with paying larger multiples for assets, at higher borrowing costs, and fewer short term liquidity options. This is compounded by the fact that getting deals done is becoming increasingly complex. To cope, PE firms are holding their assets longer, at an average of 6.6 years—a 14% increase compared to ten years ago.

The current environment is shining a light on how critical it is to generate operating leverage in a market where tailwinds from multiple expansion have turned into headwinds.

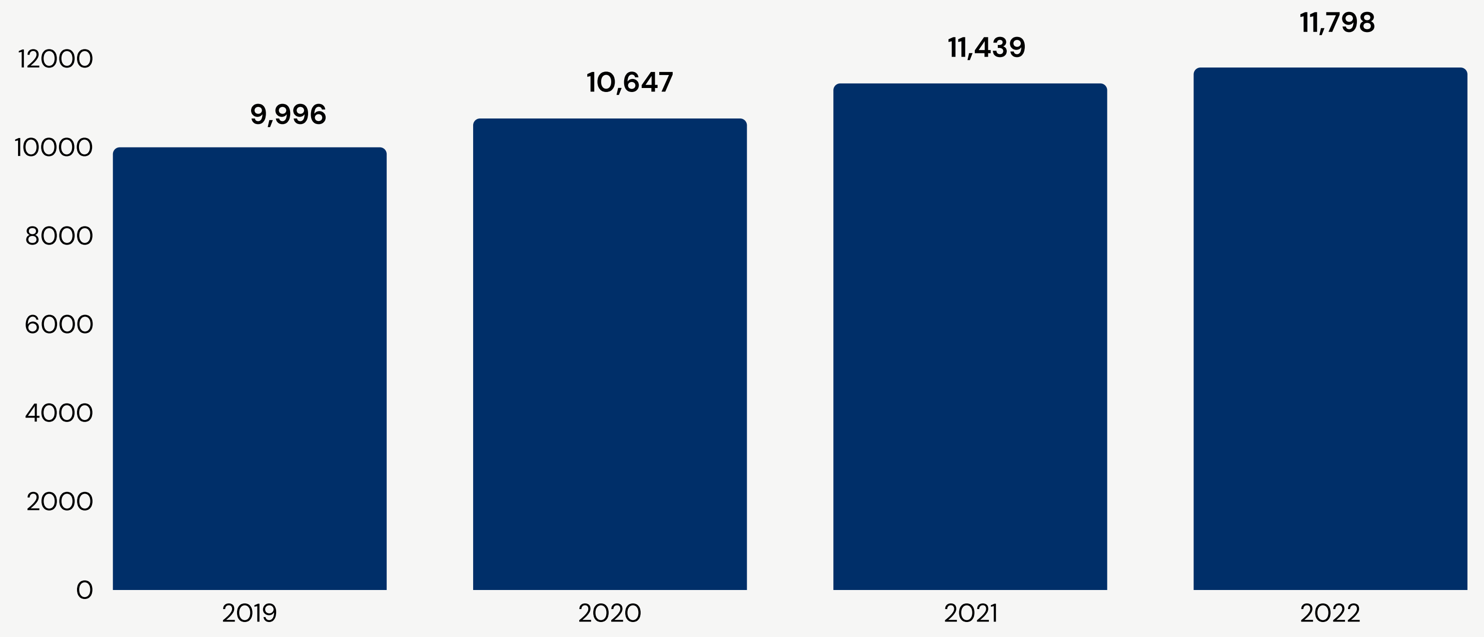
The traditional levers of value creation, primarily financial engineering, are no longer sufficient to meet the escalating expectations. Instead, PE firms must dive deeper into operational improvements and explore new avenues for value creation to stay competitive. The days of “one-and done” interventions are well behind us.

The Rise in PE Dry Powder



Source: Preqin

The Rise in Active PE Firms



Source: Pitchbook, S&P Capital IQ 2023

A Multitude of Headwinds

The current dynamics have intensified the operating pressure on PE investors to generate greater profits and future cash flow from the investments they make. General Partners (GP's) now must contend with a growing multitude of headwinds to stay competitive.

The level and age of the dry powder in their funds is creating a heavy incentive to get moving. The industry is sitting on a stockpile of undeployed capital, equating to $3.9 trillion in dry powder, the largest share of it ($1.2 trillion) in buyout funds. This slowdown in dealmaking has also increased the average age of that buyout capital; around 26% of it is 4+ years old and aching to be deployed.

High interest rates make acquisition "math" harder to pencil due to the rising cost of capital. When rates go down, multiples of cash flow go up, and vice versa. Because of that, historically low rates for the past decade have provided a tailwind for deals by keeping price multiples growing. However, in the current interest rate environment, that calculus is much harder to make work.

The significant surge in the number of firms vying for a limited pool of investment opportunities is creating fierce competition. Sellers are only bringing to market the highest-quality assets, those they are confident will move at a reasonable return. The proliferation of PE entities, coupled with the scarcity of attractive deals, has intensified the battle for assets, making differentiation and strategic value creation more crucial than ever in securing and maximizing investments.

"In this challenging climate, with a ton of undeployed capital and intense competition, our strategy is pivoting towards deeper, data-driven operational insights to drive value and secure competitive advantages."

– Managing Director of Top 10 PE Firm

"The ‘08–’22 playbook of financial engineering, cost out, install new management, and benefit from market beta – is done.

The road to value creation, and ultimately, returns, goes through tangible performance improvement – i.e. improving the cash conversion cycle, tight GTM strategy, KPI definition and monitoring, etc."

– CEO of a PE data analytics firm

Moving Towards New Territory

What’s clear is that sitting around and waiting for conditions to recover is not a viable strategy. The traditional levers of value creation, primarily financial engineering, are no longer sufficient to meet the escalating expectations. Instead, PE firms must dive deeper into operational improvements and explore new avenues for value creation to stay competitive.

E firms must look beyond their traditional financial engineering levers of add-ons, financial management, financial leverage, and operational cost control. Instead they need to lean into and improve their operations and systems for driving organic revenue growth.

Leaders recognize that financial engineering is only the first step toward generating value and will account for just 25% of their efforts. The belief is that the remaining 75% should focus on operational value creation (Accenture 2024).

But Current Models For Assessing Value Drivers Are Insufficient

The Traditional tools in the value creation toolbox have proven to be insufficient. The "science of growth" is not very well understood by investors, owners and management teams because they can not reliably assess the drivers that lead to sustainable revenue growth.

Traditional financial analysis and Quality of Earnings only tell part of the picture. These types of backward looking financial analysis provide little visibility into the causal chain of events that leads to revenue growth and future cash flow, or the keys that underlie firm value. These traditional tools lack the capacity to offer a comprehensive and reliable picture, missing up to three-quarters of the future earnings picture.

Forecasting is increasing complex and limited due to the interdisciplinary nature of how businesses operate. The lack of timely and accurate information in these forecasts make it nearly impossible for production, sales and success and finance teams to adjust operationally to gaps between client usage and expectations and the execution required to realize revenues.

T**he commercial assets that support growth are inherently intangible and are unreported.** This leaves investors without a clear understanding of the specific assets, capabilities, and causal chain of events that lead to revenue growth when evaluating target acquisitions and creating value creation plans for their portfolio companies.

"The fractured management of revenue generating resources, assets, systems and teams across functional silos is a significant drag on future revenues and blinds investors and managers to ways they can generate more revenue from their capital and operating budgets"

– Stephen Diorio, Author Revenue Operations

“The real-world problem of growing a business is interdisciplinary in nature. Leaders need better tools to manage, coordinate, and align all these disciplines coherently around the customer. Being the captain who coordinates and leads all those functions in a business is a big job, but an essential one.”

– Professor at the Wharton School of Business

A New Approach Is Needed

To execute this effectively, investors need to work directly with the sales, marketing, customer success, and operations leaders within their portfolio companies to drive more scalable, profitable and consistent growth. They must find ways to leverage data, systems, insights and process improvements to unlock more revenue growth from customer relationships, selling channels and markets they already have access to.

This makes the ability to reliably assess, improve, and maximize a company’s core underlying ability to generate these future cash flows a very important business discipline.

This is central to creating a modern, data driven value creation plan that is focused on improving results and driving execution. The challenge for both investors and operators is that growing a business in 2024 is complex, data-driven, capital intensive, and interdisciplinary. Forward looking PE firms can get better at creating value and capturing it by understanding the underlying value levers that generate revenue growth. Doing this systematically, in a data-driven and empirical way requires a standardized proven framework.

The Quality of Revenue Assessment

The Quality of Revenue Assessment Model

The QoR framework is built on the premise that sustainable revenue growth is significantly influenced by internal operational levers and functional drivers. These include, but are not limited to:

- The alignment of the commercial teams, systems, processes and operations that support the full revenue cycle across people, product, process, and technology;
- The robustness of the core functional capabilities in sales, marketing, customer success, product and revenue cycle management;
- The strength of growth leadership and the growth strategy, planning process, and culture they have instilled;
- The maturity of core operational capabilities in pricing, analytics, performance measurement, and customer experience management.

Through a comprehensive evaluation of 50 distinct criteria across 12 core operational domains, the QoR model offers private investors a granular view of a company's revenue generation ecosystem. This assessment facilitates the identification of potential gaps in execution and strategy alignment, thereby enabling targeted interventions for improvement.

Culture	Strategy	Human Capital	Business Process
• Alignment with Strategy • Innovation & Growth • Customer Centricity • Ability & Willingness to Change	• Strategic Plan • Clarity & Acceptance of Vision • Right to Win & Value Prop • Target Market TAM/SOM	• Org Chart Design • Goal & Compensation Alignment • Talent Acquisition & Development • Employee Engagement & Feedback	• Ability to Execute • Performance Metrics & KPI's • Value Prop Delivery • Communication Effectiveness
Sales Practices	**Marketing and Brand**	**Customer Management**	**Revenue Operations**
• Sales/GTM Plan • Revenue Goals & Achievement • Forecast Accuracy & Methodology • Sales Management • Sales Talent: Quantity & Quality • Sales Talent: Process • Sales Methodology	• Brand • Lead Gen & Funnel Management • Marketing Channel Optimization • Marketing Operations • Content Strategy • Project/Campaign Management	• Customer Preference • Account Management • Customer Data & Analytics • Customer Engagement & Feedback • Customer Service & Success • Customer Retention & Churn	• Rev Ops Plan • Cross Functional Alignment • Customer Lifecycle Management
Revenue Tech & Data	**Pricing**	**Product**	**Business & ops Risk**
• Tech Stack Alignment & Automation • CRM Utilization • Database & Data Integrity • Analytics and Reporting Capabilities	• Pricing Structure • Discipline & Governance • Pricing Accuracy • Pricing Capabilities	• Product Quality & Fit • Product Management • Product Development • Product Differentiation	• People Risk • Process Risk • Technology Risk • Market Risk

A Closer Look At The QoR Value Drivers

Strategic Foundations

These drivers combine the foundational elements of culture and strategy with human capital, emphasizing the alignment between a company's strategic direction, its cultural ethos, and the management of its workforce. It underscores the importance of a coherent vision, a competitive value proposition, and a workforce that is both capable and motivated to execute the company's strategy.

Strategy	
Driver	**Evaluation**
Strategic Plan	Evaluate the comprehensiveness, coherence, and feasibility of the strategic plan. This involves looking at how the plan integrates with the company's revenue goals, operational capabilities, and market opportunities.
Clarity & Acceptance of Vision	Develop a comprehensive understanding of the company's vision and the extent to which it is understood and embraced by the entire organization, from leadership to frontline employees.
Right to Win & Value Prop	Develop a clear understanding of the company's position in the market and its competitive advantages, which directly influence its ability to attract and retain customers, thereby impacting revenue.
Target Market	Assessing the company's ability to capture market share and provide insight into the company's growth potential and market penetration strategy.

Culture	
Driver	**Evaluation**
Strategic Alignment	Determine whether the company's cultural values, norms, and behaviors are in harmony with its strategic goals.
Innovation & Growth	Assess the extent to which the company's culture fosters innovation and supports growth initiatives by examining openness to new ideas, tolerance for risk, and encouragement of creative problem-solving among employees.
Customer Centricity	Determine how customer-focused values are ingrained in the company's culture.
Adaptability	Assess how the company responds to external pressures, internal challenges, and opportunities for improvement.

Human Capital	
Driver	**Evaluation**
Org Chart Design	Evaluate the organizational structure for clarity, efficiency, and alignment with business strategy.
Goal and Compensation Alignment	Assess the extent to which employee goals and compensation structures are aligned with the company's strategic objectives and revenue targets.
Talent Acquisition	Evaluate the company's ability to attract, hire, and develop talent. This includes examining recruitment strategies, onboarding processes, and ongoing development opportunities.
Employee Engagement & Feedback	Gauge the level of employee engagement and the effectiveness of feedback mechanisms within the company.

Business Process	
Driver	**Evaluation**
Ability To Execute	Examine the company's effectiveness in translating the strategic plan into actionable tasks and achieving desired outcomes. This includes assessing the robustness of operational processes, resource allocation, and project management practices.
Performance Metrics & KPI's	Assess the extent to which the company utilizes relevant and meaningful performance metrics and KPIs to monitor and drive business operations
Value Prop Delivery	Assess how well the company manages the entire customer lifecycle, from acquisition through retention and expansion.
Communications Effectiveness	Analyze the clarity, consistency, and channels of communication within the company and with its customer base.

A Closer Look At The QoR Value Drivers

Operational Excellence

These drivers represent the real world interactions between sales, marketing, and customer success teams. It highlights the critical role of efficiently designed processes, effective sales and marketing strategies, comprehensive customer management, and cohesive revenue operations in driving sustainable revenue growth.

Sales Practices	
Driver	**Evaluation**
Sales Strategy	Determine the sales strategy's alignment with overall business objectives, and how the strategy targets customers, leverages it’s competitive advantage, and aligns with the company's value proposition.
Sales Process	Evaluate the sales process, from lead generation to closing deals. Determine the effectiveness of the sales process and it’s impact on deal flow, pipeline metrics, and conversion rates.
Incentives/ Attainment	Evaluate the design of incentive structures and the alignment of sales performance metrics with broader business goals to determine how leadership drives desired behaviors.
Sales Management	Assess sales management, leadership, oversight, training, and support for the sales team, and determine it’s operational excellence in sales.

Revenue Operations	
Driver	**Evaluation**
Revenue Ops Plan	Evaluate the clarity, and strategic alignment of the company's revenue operations strategy and how well sales, marketing, and customer success functions to drive cohesive and efficient revenue generation.
Cross Functional Alignment	Determine the level of coordination and collaboration between different functions involved in revenue generation, such as sales, marketing, and customer success.
Customer Lifecycle Management	Assess how well the company manages the entire customer lifecycle, from acquisition through retention and expansion.
Incentive Alignment	Evaluate whether the incentives for revenue-generating teams are aligned with the company's overall revenue goals and customer satisfaction objectives.

Marketing and Brand	
Driver	**Evaluation**
Marketing Strategy	Evaluate the marketing strategy and it’s alignment with the company's overall objectives. This involves assessing how it defines market positioning, target market identification, value proposition clarity, and the use of marketing channels.
Marketing Operations	Develop a comprehensive understanding of the company's marketing operations, including campaign management, lead generation, and utilization of marketing technology, ensure that marketing efforts are scalable, measurable, and impactful.
Brand	Determine the strength and recognition of the brand within the target market and its alignment with the company's strategy, business objectives, and value proposition.
Funnel Management	Assessing the company’s management of the marketing funnel from awareness through conversion and determine how leads move through the marketing funnel.

Customer Management	
Driver	**Evaluation**
Account Management	Determine how the company ensures that customer relationships are nurtured and developed, leading to increased customer lifetime value and opportunities for upselling and cross-selling.
Customer Data & Analytics	Evaluate the use of customer analytics and data across revenue processes and how this informs more targeted and effective marketing, sales, and service strategies.
Customer Retention, Churn, and Expansion	Evaluate how the company monitors and optimizes customer retention rates while minimizing churn and determine the processes that support customer expansion.
Customer Service/Success	Evaluate the strength of the company’s customer service/success programs to determine how they resolve issues and anticipate customer needs.

A Closer Look At The QoR Value Drivers

Innovation, Positioning, and Risk

These drivers bring together the elements of product innovation, technology and data utilization, pricing strategies, and the overarching business and operational risks. It underscores the importance of product differentiation, technological adaptation, strategic pricing, and risk mitigation in maintaining competitive advantage and ensuring long-term business resilience.

Pricing	
Driver	**Evaluation**
Pricing Structure	Analyze the logic, flexibility, and market alignment of the company's pricing models and tiers.
Pricing Accuracy	Determine the precision with which prices are set in relation to costs, value delivered, and competitive positioning.
Discipline and Governance	Assess the rigor and consistency of pricing policies and the mechanisms in place for enforcing them across revenue teams.
Pricing Capabilities	Assess the company's ability to adjust prices in response to market conditions, customer demand, and inventory levels to maximize revenue opportunities.

Product	
Driver	**Evaluation**
Product Quality & Fit	Assess the quality of the product in terms of features, reliability, and usability, and how well it meets the needs and expectations of the target market.
Product Management	Examine the effectiveness of product management practices, including how products are planned, executed, and maintained throughout their lifecycle.
Product Development	Evaluate the company's capabilities and processes for developing new products or enhancing existing ones. This includes the speed, innovation, and efficiency of the development process, as well as its alignment with customer needs and business objectives.
Product Differentiation	Assess the uniqueness of the product in the marketplace and its ability to stand out from competitors

Revenue Technology and Data	
Driver	**Evaluation**
Tech Stack Alignment	Analyze the extent to which the company's technology stack is integrated and aligned with its revenue goals and operational needs.
CRM Adoption and Utilization	Assess how effectively the company utilizes its CRM system to manage customer interactions, sales pipelines, and marketing efforts.
Data Hygiene and Integrity	Evaluate the accuracy, consistency, and cleanliness of the company's data, particularly within the CRM and other revenue-related systems.
Analytics and Reporting Capabilities	Assess the robustness and accessibility of analytics and reporting features within the company's revenue technology stack.

Business and Operations Risk	
Driver	**Evaluation**
People Risk	Assess the risks related to the company's dependence on key personnel, the impact of potential talent shortages, and the effectiveness of succession planning.
Process Risk	Examine the vulnerabilities within the company's operational processes that could lead to inefficiencies, errors, or failures.
Technology Risk	Evaluate the potential risks associated with the company's use of technology, and the adaptability of the tech stack to evolving business needs.
Market Risk	Evaluate the company's exposure to external market factors, such as economic downturns, changing consumer preferences, and competitive pressures, that could impact its revenue and profitability.

Applications of Quality of Revenue Across The Deal Cycle

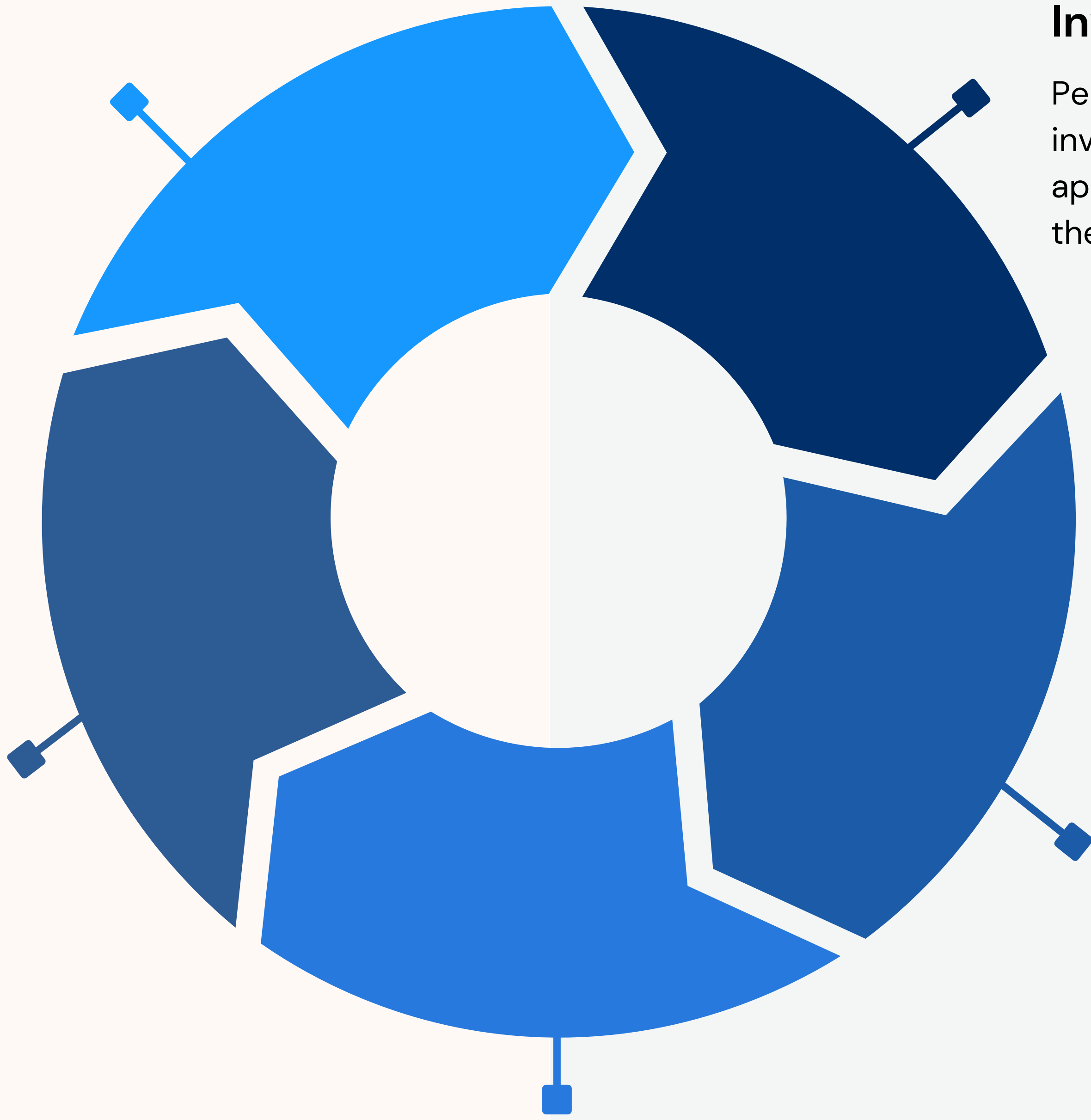
Existing Portfolio Companies

Exit

Use QoR to help tell a complete value creation story to prospective buyers. This will help with the alignment of the assets core business functions leading up to an exit event. It will also demonstrate a clear understanding of how the company's people, processes, and systems work together in unison to generate revenue.

Portfolio Growth

QoR is a diagnostic tool that pinpoints the causes of underperformance and enables management to reallocate resources effectively, align various revenue functions, and optimize the revenue cycle.



New Investments

Investment Screening

Perform a QoR in pre-diligence investment screening to qualify investment opportunities by leveraging a systematic and proven approach to screen potential investment opportunities by examining the robustness of the company's growth capabilities.

Due Diligence

Get deeper insights into a company's operational dynamics, often overlooked by traditional commercial and financial diligence. This helps mitigate risks, ensuring a smoother transition post-acquisition, and establishing a collaborative relationship with the management team from the outset.

Post-Closing

Enables both the investment and management teams to unify around a clear understanding of the business's current state. This helps facilitate consensus among the board and management, and guides priorities that significantly influence revenue growth and value.

Process & Timeline

Before the launch, we will establish the project's scope, roles, and expectations, and discuss launch notifications and messaging to ensure clear communication with all stakeholders. We understand each firm has unique processes, and we are ready to adapt our approach for seamless integration with yours.

Our high-level approach and process consists of:

- **Data**: Systematically examining financial statements, sales reports, marketing materials, and other relevant documents to understand the company's revenue streams and financial health.
- **Confidential Interviews:** Conduct interviews for feedback to identify patterns in revenue operations, integrating these insights with other QoR assessment components.
- **Scorecard & Recommendations:** Benchmark the performance of each lever, allowing for a clear, numerical representation of where the company stands in relation to best practices. Link scores to specific, actionable recommendations for closing identified gaps, with priorities based on the impact on revenue growth.
- **Delivery:** Presenting an in-depth analysis of each assessed area, highlighting strengths, weaknesses, and identified patterns that impact revenue operations, based on both quantitative data and qualitative feedback from our analysis.

Week 1
Configuration

- Basic administrative tasks to prepare for the rest of the engagement
- Request submitted materials
- Data room access (if diligence module)

Week 2-4
Assessment

- Evaluate submitted materials
- Conduct internal employee discussions
- Connect with key stakeholders as necessary
- Regular status updates & delivery of initial insights

Week 5+
Implementation

- Scorecard delivered
- Recommendations delivered
- Action report & playbooks delivered
- In-depth discussion of findings & recommendations
- Implementation assistance as needed

Example Report

The following is an example report of XYZ Co's "Customer Management" practices. A full report would include all 12 drivers.

Example – Customer Management Scorecard

Summary of Findings (Scores below benchmark):

- **Ineffective Account Management:** The company lacks a structured approach to managing and developing customer accounts, leading to missed opportunities for deepening relationships and driving account growth.

- **Weak Customer Support and Success Initiatives:** Customer service is reactive rather than proactive, with limited efforts to ensure customer success and satisfaction. This is resulting in poor customer experiences and increased churn.

- **High Churn Rates:** Below-average performance in customer management which is translating into higher than industry-standard churn rates.

- **Limited Growth from Existing Customer Base:** There is inadequate focus on identifying and capitalizing on upselling and cross-selling opportunities, leading to stagnant revenue growth from the existing customer base.

Customer Management Scorecard

Evaluation Criteria	Score (1-5)	Benchmark	Insights
Account Management	3	**Developing**	The company has some initiatives to identify cross-selling and upselling opportunities within existing accounts, but the success of these initiatives is inconsistent and not predictable due to a lack of integration into the overall account management approach. The company does some account segmentation, but the criteria for segmentation and the strategic focus allocated to different segments may are not optimized to prioritize high-value or high-growth potential accounts.
Customer Data & Analytics	4	**Advanced**	The company effectively gathers a wide range of customer data across multiple points in the buying process. Customer data insights are not siloed but shared and integrated across various departments, including sales, marketing, customer service, and product development.
Customer Retention, Churn, and Expansion	1	**Underdeveloped**	The company experiences higher than industry-standard customer churn rates, indicating misalignment between customer expectations and the value delivered by the company's products or services. The company lacks a systematic churn analysis to understand why customers are leaving, preventing the company from addressing root causes and improving retention. There are also no effective channels or processes for gathering and acting on customer feedback, preventing the company from addressing dissatisfactions that lead to churn.
Customer Service/Success	2	**Basic**	The company has a functional customer support system in place, but it is reactive rather than proactive, primarily focused on resolving issues as they arise without necessarily anticipating customer needs. It was found that there are minimal efforts towards engaging customers post-sale, leading to a lack of adoption in the first 90 days post implementation. The company tracks basic customer service and success metrics, but the use of these metrics to inform strategic decisions and operational improvements is sporadic and not deeply ingrained in the company culture.

Example – Customer Management Diagnostic

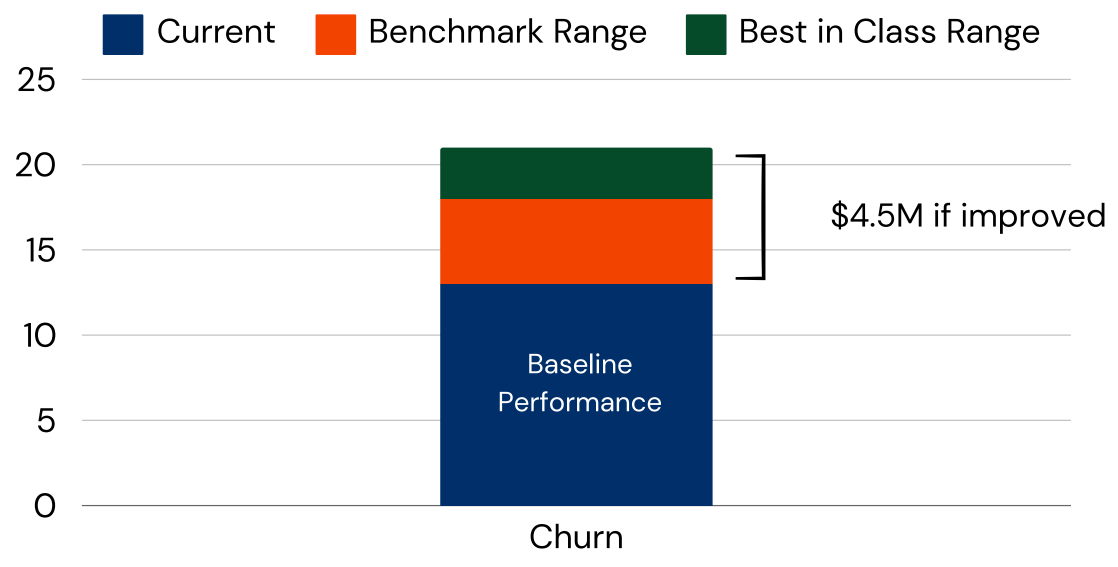
Up to $7.5M in recoverable revenues was identified by making improvements across customer retention, account management, and customer success practices over a 3 year period.

The current customer retention rate at XYZ Co is X% and it is recommended they target Y% customer retention to meet the threshold for peer benchmarks. This represents a Z% increase in annual customer retention of the company's SMB and enterprise accounts.

Additionally, the company lacks sophisticated customer onboarding procedures for new clients which is also contributing to the churn problem. When customers do churn, 75% of it occurs with the first 90 days post implementation. The combination of these factors represents **$1.5M in incremental value** per year if realized.

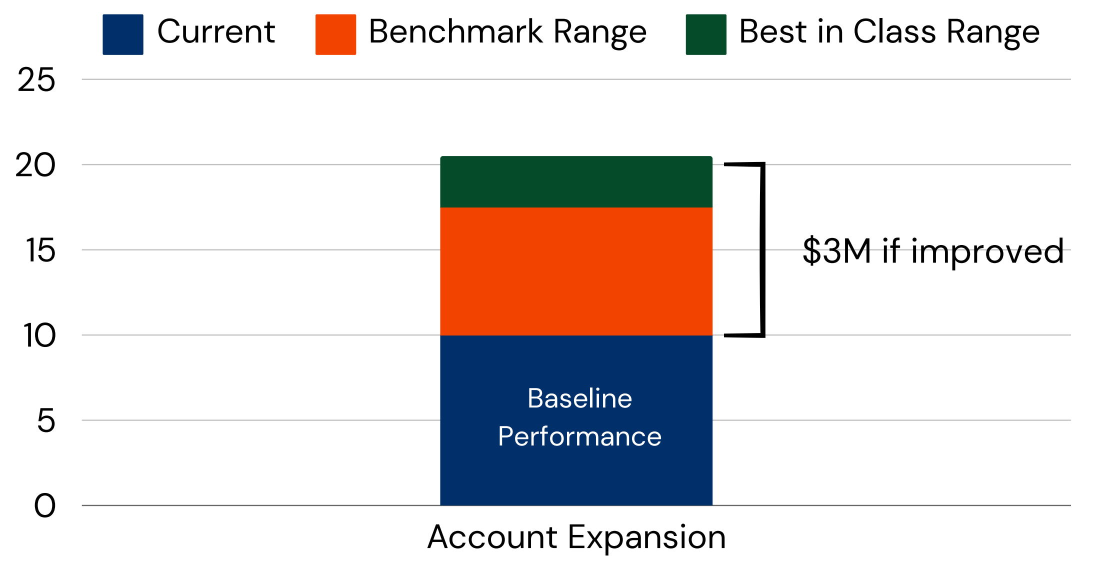
The company lacks defined playbooks for up-selling and cross-selling existing customers. They need to develop stronger segmentation of their customer base and identify the criteria and signals that determine candidacy for upsells/cross sells. An X% improvement in cross-selling and upselling to SMB accounts alone would yield **$1M in incremental value** per year if realized.

Improving customer retention delivers $4.5M in incremental revenue



Improving customer retention benchmark from underdeveloped to advanced would result in **$4.5M in realized revenue** over a 3 year period.

Improving cross-sell/up-sells delivers $3M in incremental revenue



Improving account management benchmark from developing to best in class would result in **$3M in realized revenue** over a 3 year period.

Example – Customer Management Implementation Recommendations

Action plan recommendations to recover latent revenue across account management and customer success functions.

Item	Description	Outcome	Timeframe
Churn analysis	Perform a churn analysis to evaluate why accounts have churned in the last 24 months. Quantify the impact of churn on revenue during this time period and aggregate quantitative and qualitative findings.	Clear identification of the root causes of why churn has occurred historically. This will help leadership put measures in place for more proactive intervention.	2Q24
Customer Health	Implement a customer health scoring model that analyses customers based on NPS, CSAT, and usage at the account level.	Customer Success Managers are able to identify accounts with a higher likelihood of churning and intervene before churn occurs.	2Q24
Customer Onboarding	Develop robust 30-60-90 days customer onboarding plan aimed at driving adoption and getting to the first point of value.	Customer Success Managers will have a documented, systematic process for ensuring that new customers are onboarded and adopting the platform successfully.	3Q24
Account Segmentation	Segment existing customer database based on ARR and profitability. Assign accounts based on Small/Medium/Large customers.	Give Account Managers the ability to prioritize and focus on customers that contribute the most ARR to the business.	3Q24
Cross-sell/Up-sell Playbook	Create an account management playbook for common up-sell and cross-sell opportunities within existing accounts. Determine signals based on High Potential > Medium Potential > Low Potential opportunities.	Account managers have documented plays for upselling and cross selling existing customers. This will improve revenue expansion within existing customer base.	4Q24

Get In Touch

How We Can Help

We provide Quality of Revenue assessments across the entire deal cycle which spans due diligence, deal support, post closing, and ongoing portfolio operations. Our team consists of experienced operating executives that understand that the private equity landscape is evolving rapidly and getting deals done is becoming increasing complex. We plug into your current process to help your firm make informed strategic decisions, optimize operations, and align investments toward sustainable revenue growth.

About Slate Point Partners

Slate Point Partners is a revenue operations benchmarking and advisory firm. Our proprietary Quality of Revenue assessment helps investors, CEOs, and their management teams evaluate and understand the key intangible assets that impact a company's ability to generate future revenues that are missed by financial analysis. This approach can significantly reduce the risks, price, and costs of their investments.

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