HIXON ENTERPRISE PARTNERS

Sample Growth Accelerator Roadmap

A worked example: the readout for Client Name

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The client is invented. The figures are constructed to be internally consistent.

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The business today, the eight pillars, and what to do and what it is worth.

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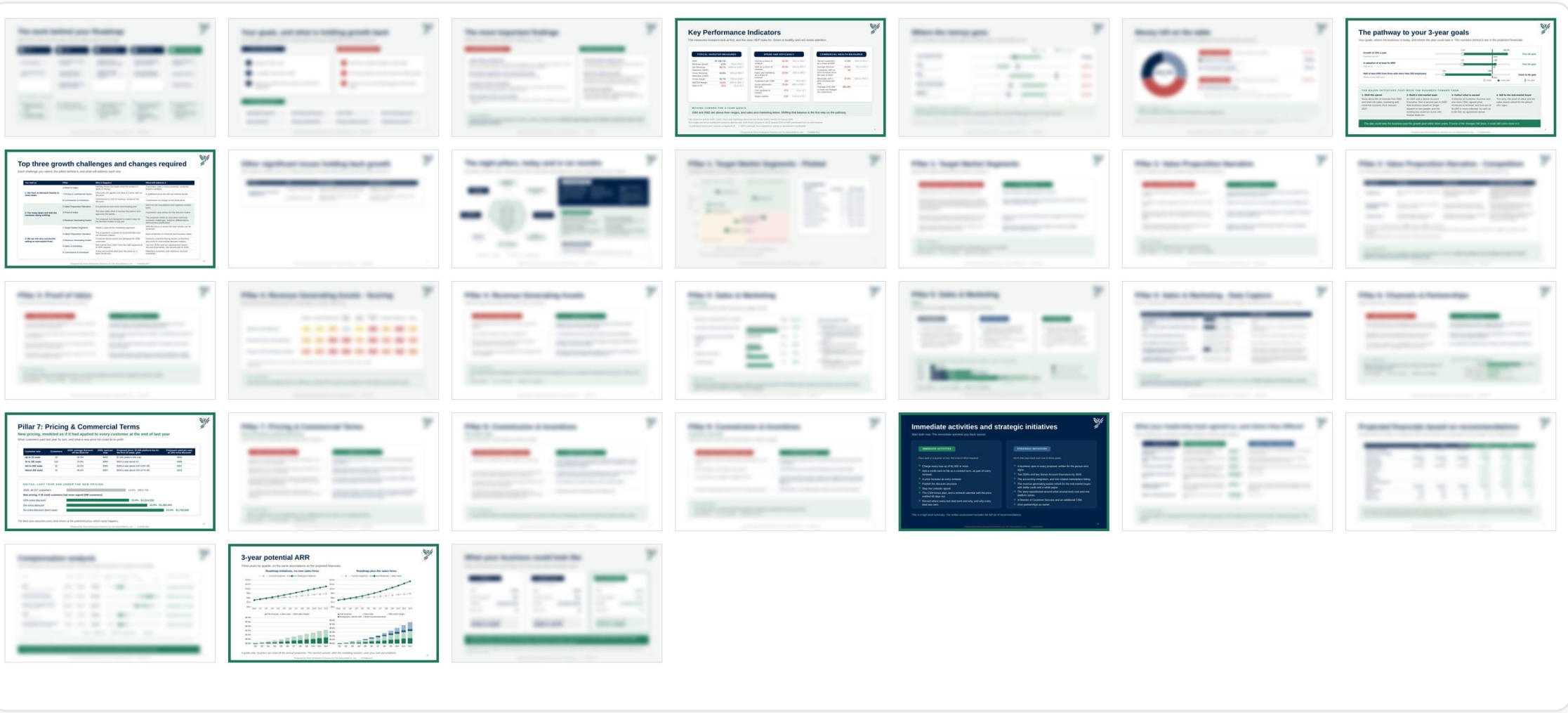
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This sample is 6 of the 31 slides in a full readout

The six outlined in green follow this page. The rest are what a client receives in the full readout.



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Key Performance Indicators

The measures investors look at first, and the ones HEP looks for. Green is healthy and red needs attention.

TYPICAL INVESTOR MEASURES

ARR	$7,196,700	
Revenue growth	6.0%	5% to 15% †
Net Revenue Retention (NRR)	**96.7%**	100% to 110% *
Gross Revenue Retention (GRR)	94.8%	90% to 95% *
Gross margin	82.7%	72% to 85% *
EBITDA margin	**14.6%**	20% to 30% †
Rule of 40	**20.6**	25 to 35 †

SPEND AND EFFICIENCY

G&A as a share of revenue	**18.3%**	10% to 15% †
R&D as a share of revenue	**34.3%**	15% to 25% †
Sales and marketing as a share of revenue	**15.5%**	20% to 30% *
Customers per CSM	**115**	40 to 80 †
Quota attainment last year	**72.0%**	80% to 90% †
CAC payback in months	17.5	12 to 18 †
Magic number	**0.26**	0.50 to 0.75 †

COMMERCIAL HEALTH MEASURES

Top ten customers as a share of ARR	17.5%	10% to 25% †
Average discount	**25.4%**	8% to 15% †
Customers with no price increase since the start of 2023	**60**	
Renewals with a price increase last year	**37.4%**	55% to 75% †
Overage of $1,000 or more not charged (52 customers)	**$86,296**	

MOVING TOWARD THE 3-YEAR GOALS

G&A and R&D are above their ranges, and sales and marketing below. Shifting that balance is the first step on the pathway.

P&L measures are for 2025. Sales, churn and marketing measures are for the twelve months to August 2026.

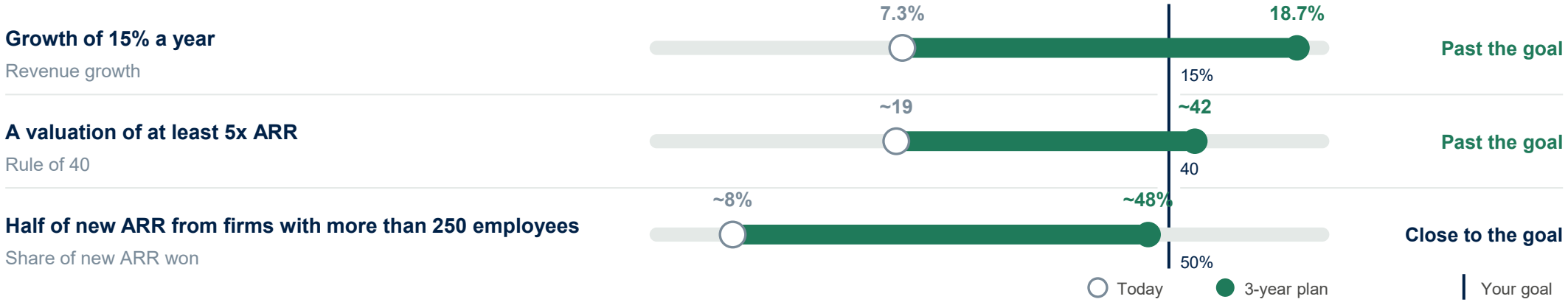
The ranges are for an established business like this one: B2B SaaS, founded in 2013, around $7M of ARR and funded from its own revenue.

** A published benchmark; sources in Appendix B. † HEP's estimate, from experience, where no benchmark is published.*

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The pathway to your 3-year goals

Your goals, where the business is today, and where the plan could take it. The numbers behind it are in the projected financials.



THE MAJOR INITIATIVES THAT MOVE THE BUSINESS TOWARD THEM

1. Shift the spend

Move about 8% of revenue from R&D and G&A into sales, marketing and customer success, from January 2027.

2. Build a mid-market team

An SDR and a Senior Account Executive, then a second pair in 2028. New business would no longer depend on two people, and the existing two could win some mid-market deals too.

3. Collect what is earned

A Director of Customer Success and one more CSM, agreed price increases at renewal, and true-ups of $1,000 or more collected: by card up to $2,000, by agreement above.

4. Sell to the mid-market buyer

The story, the proof of value and the sales assets rebuilt for the person who signs.

The plan could take the business past the growth goal within three years. If some of the changes fall short, it could still come close to it.

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Top three growth challenges and changes required

Each challenge you raised, the pillars behind it, and what will address each one.

You told us	Pillar	Why it happens	What will address it
1. We have to discount heavily to close deals.	3 Proof of Value	Nothing shows the buyer what the product is worth in money.	A business case in every proposal, using the buyer's numbers.
	7 Pricing & Commercial Terms	Discounts are agreed one deal at a time, with no structure.	A published price list with set volume bands.
	8 Commission & Incentives	Commission is 15% of revenue, whatever the discount.	Commission on margin at the band price.
2. Too many deals end with the customer doing nothing.	2 Value Proposition Narrative	It is pitched as one more time-tracking tool.	Sell it as the one platform that replaces several tools.
	3 Proof of Value	The deal stalls when it reaches the person who approves the spend.	A business case written for the decision-maker.
	4 Revenue Generating Assets	The proposal isn't designed to make it easy for the decision-maker to say yes.	The proposal needs an executive summary, customer challenges, solution, differentiation, and business justification.
3. We are not very successful selling to mid-market firms.	1 Target Market Segments	Needs a data-driven marketing approach.	Shift the focus to where the best results can be achieved.
	2 Value Proposition Narrative	The proposition is aimed at recommenders but not decision-makers.	More emphasis on financial and business value.
	4 Revenue Generating Assets	Customer-facing assets are designed for SMB customers.	Enhance customer-facing assets so that they also work for mid-market decision-makers.
	5 Sales & Marketing	Mid-market hires didn't have the right experience or SDR support.	Hire two SDRs and two experienced Senior Account Executives, the second pair in 2028.
	8 Commission & Incentives	A long mid-market deal pays the same as a quick small one.	Milestone incentives and reference account incentives.

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Pillar 7: Pricing & Commercial Terms

New pricing, modeled as if it had applied to every customer at the end of last year

What customers paid last year by size, and what a new price list could do to profit.

Customer size	Customers	2025: average discount off the $516 list	2025: paid per seat	Proposed price: $7,400 platform fee for the first 15 seats, plus	Proposed: paid per seat, at 10% extra discount
Up to 15 seats	19	16.3%	$432	$7,400 platform fee only	**$543**
16 to 100 seats	162	23.6%	$394	$420 a seat above 15	**$398**
101 to 250 seats	31	33.2%	$345	$340 a seat above 100 (19% off)	**$357**
Above 250 seats	15	40.6%	$307	$305 a seat above 250 (27% off)	**$319**

EBITDA, LAST YEAR AND UNDER THE NEW PRICING



The best case assumes every deal closes at the published price, which rarely happens.

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Immediate activities and strategic initiatives

Start both now. The immediate activities pay back sooner.

IMMEDIATE ACTIVITIES

Pays back in a quarter or two. Not a lot of effort required.

- Charge every true-up of $1,000 or more.
- Add a credit card on file as a contract term, as part of every renewal.
- A price increase at every renewal.
- Publish the discount structure.
- Stop the LinkedIn spend.
- The CSM bonus plan, and a renewal calendar with the price notified 60 days out.
- Record where every lost deal went and why, and why every deal was won.

STRATEGIC INITIATIVES

Work that pays back over one to three years.

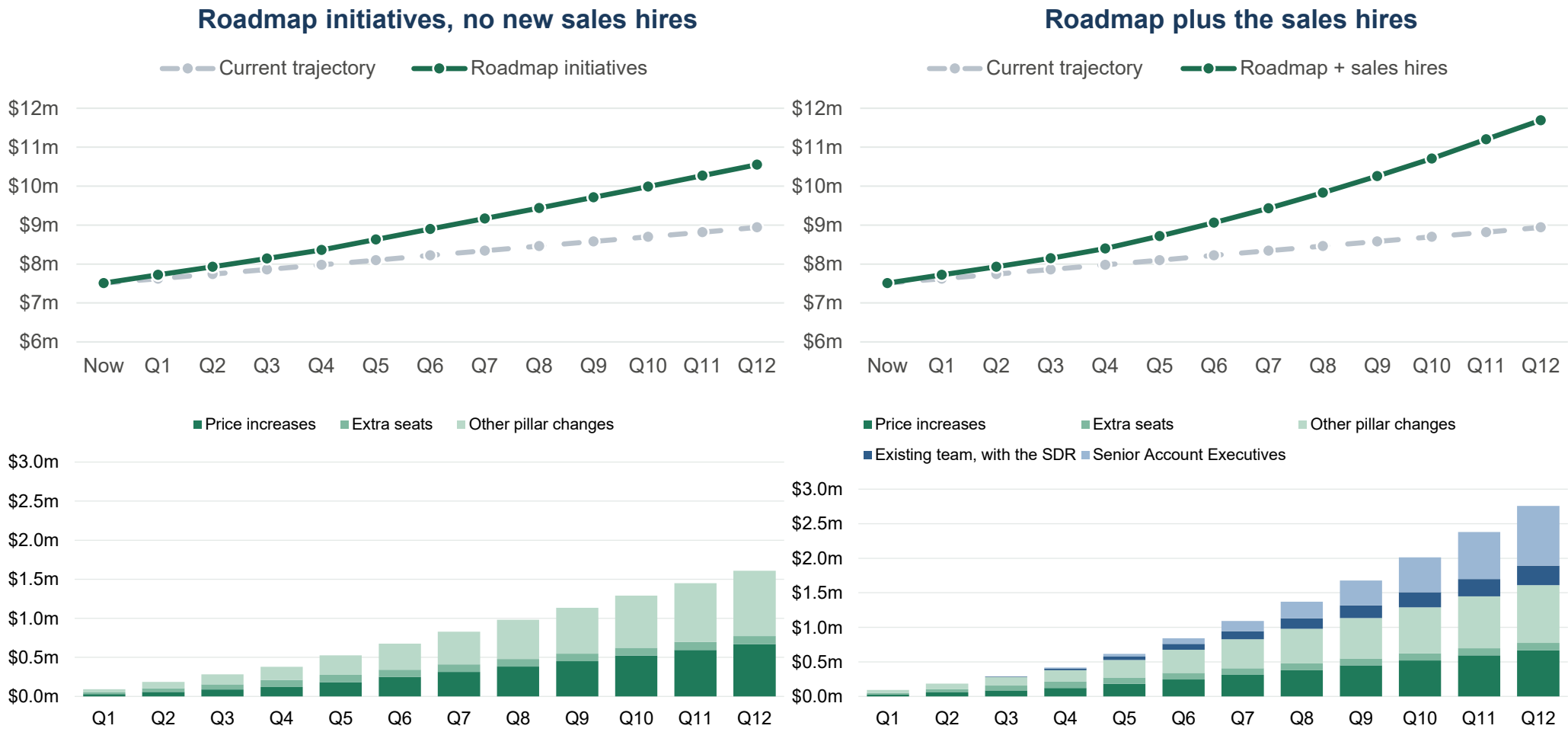
- A business case in every proposal, written for the person who signs.
- Two SDRs and two Senior Account Executives by 2028.
- The accounting integration, and one related marketplace listing.
- The revenue generating assets rebuilt for the mid-market buyer, with battle cards and a white paper.
- The story repositioned around what several tools cost and one platform saves.
- A Director of Customer Success and an additional CSM.
- Give partnerships an owner.

This is a high-level summary. The written assessment includes the full set of recommendations.

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3-year potential ARR

Three years by quarter, on the same assumptions as the projected financials.



A guide only. Quarters are read off the annual projection. The second version, after the modeling session, uses your own assumptions.

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Let's Accelerate Growth

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