

Land and Expand Strategies - Spring 2021

For ARR Growth and Retention

The probability of selling to an existing customer is 60 – 70% and to a new prospect is 5-20%
Marketing Metrics



A 2% increase in retention can result in a 10% reduction in costs.

Leading on the Edge of Chaos, Murphy and Murphy

Executive Summary

Lacking an effective land and expand strategy, B2B companies often find ARR growth slow or stall, particularly when attempting to transition Clients to digital services and experiences. Upturn will assess your current client journey and provide services to get your teams on track with clients while achieving your big ARR Growth and Retention objectives.

Upturn Consultants help you **Land and Expand**

Challenges

We've seen challenges of stalled growth that amount to perpetual activities that do not add real **client value**. These activities may include Sales having an executive relationship to close the deal but the Sales Executive unwilling to transition or expand the relationship within his/her own organization. We've also seen digital client platforms poorly or only partially implemented creating lengthy issues lists are lengthy and become the only thing the client wants to talk about. Also, perhaps the team accountable for retention and growth does not yet exist or maybe the growth resources are not prepared for crucial client conversations or executing a cross-selling opportunity.

Another challenge we see is that there is not a budget for client retention. While we fully understand Marketing budgets focused on landing the big whale, we also know that the cost to retain clients over time dramatically increases if not addressed and for every client who leaves, two new clients must be onboarded. Particularly with the transition to a digital experience, the temptation to retain and entice with 'free' offerings grows but we've seen that not only is this expensive, savvy clients generally do not receive or perceive value with 'free' offerings. The way to growth new ARR and keep the clients you have happens through VALUE.

Upturn Consultants has three (3) unique offerings including an ARR Growth and Retention Assessment, Consulting and Advisory Services, and Due Diligence to support funding/ acquisition of B2B Tech.

OFFERING #1: ARR Growth and Retention Assessment/Advisory We partner with you to better understand how current client activities add-to or detract-from client relationships and growth.

(Continued) OFFERING 1: ARR Growth and Retention Assessment/Advisory

With clear agendas and a scheduled series of meetings, we will dig deep with your client-facing teams to assess opportunities across four dimensions including:

- How you look to Clients
- How you look to Stakeholders
- At what you need to excel
- How to continue to improve and provide Value

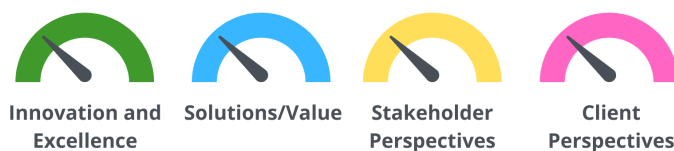
We evaluate the client journey from contracting all the way through to client performance KPIs.

What you get back from the Assessment:

- Balanced scorecard across four (4) dimensions highlighting successes and opportunities
- Summarized key findings and next-step recommendations
- Executive summary of the process and outcomes to share with your Board

ARR Growth and Retention Assessment

Key insights across four dimensions to optimize your ARR Growth



You get:

- A Balanced Scorecard
- Key Findings and Actionable Recommendations
- Summarized Next Steps

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We recommend starting with the assessment but if you already have targeted areas for improvement, we offer services to help the teams successfully Land and Expand into each account focused on two key B2B SaaS best practices:

- Helping clients optimize their investments with you
- Providing clients with actionable insights into the performance of their investments

Priced by Scope and Statement of Work, we'll work with you on several dimensions impacting your teams and roll our sleeves up to help you achieve the results you need including but not limited to:

Roles, Responsibilities, Job Descriptions, Transitions, and Onboarding When you want to show up making every interaction a value-add with clients, it's important that the client-facing teams understand roles and responsibilities and have job descriptions aligned with strategic outcomes.

(Continued) OFFERING 1: ARR Growth and Retention Assessment/Advisory

Further, as the company ARR grows through improved client relationships, you'll want to manage the talent churn smoothly and gracefully. We will help you create onboarding and transition plans to assure that client-facing resources are set up for success to appropriately engage with client teams at every level. We can assess your team for skills but will leave cognition and personality tests to the professionals.

Analyzing and Prioritizing Client Feedback We will work with the teams to examine the client feedback from CES (transactional) or NPS (relationship, loyalty) surveys to evaluate the current client experiences. While we do not execute these surveys, we can help you prioritize and focus on next steps while coaching the teams to drive optimal experiences.

Variable Compensation and Budgeting Based on Desired Outcomes. We will help you design variable compensation plans that fit the budget and growth goals while properly incentivizing the teams to achieve the best outcomes. We also work with Finance, Sales, Marketing and Support to determine the model and budget for Client Retention.

Client-Facing Teams Alignment - We expose each client-facing experience as an opportunity to deliver an exceptional experience that can encourage the client to buy more from you.

Once the roles/responsibilities are clear, we assess the team capabilities to program manage the clients relationships at the highest levels across Sales, Account Management, Professional Services and Support. We will evaluate work samples including contracts, communication plans and strategies, program plans/charters, collaborative digital work spaces between the client and the teams, understanding the client's journey with the teams, etc. We focus on the current assets and make recommendations regarding capabilities and fit for both people and processes to make sure the client success team is focused on the right outcomes. This includes methodically identifying the white space within each account and the ability to position solutions appropriately for sustained growth.

Offering #2: Objectives and Key Results (OKR Coaching)

OKRs align teams across the organization to focus on meaningful results and stop chasing the latest shiny thing. The CEO through the Receptionist understand his/her role in achieving the organizational goals by focusing attention on what will be worked on, and more importantly, what will not.

OKR Coaching
Objectives and Key Results
Transition audacious goals into measurable results.



You get:

- The Results You Need
- Cascaded Alignment
- Focused & Energized Teams

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OFFERING #3: Actionable Buy-Side Due Diligence

We offer buy-side Due Diligence to assess the current opportunities and execution to provide key insights and actionable knowledge into the transaction details. We also provide a detailed agenda and recommendations for ongoing growth and retention activities that scale and deliver the results you need.

M&A Due Diligence

Actionable, buy-side insights to inform your transaction decisions



You Get:

- Comprehensive Actionable Knowledge
- Prioritized Growth Agenda
- Realized ARR Growth and Retention

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Upturn Consultants

Visit us at: <https://upturnnow.com>

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Or Schedule a free 30 minute consultation [HERE](#)

