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Creating Enterprise Value in the First 100 Days Post-Acquisition

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How to SaaS

Creating Enterprise Value with Marketing in the First 100 Days

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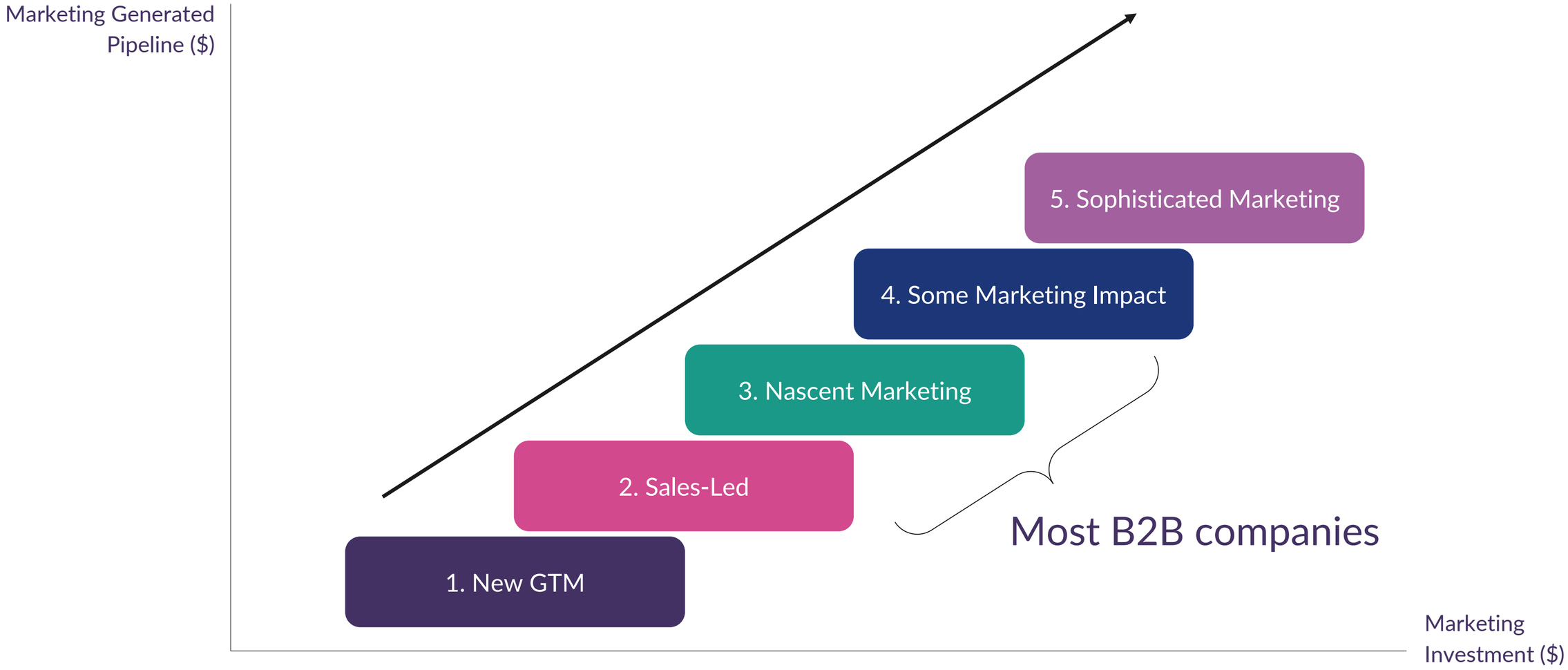
Marketing Starting Points

Every company is a **unique marketing puzzle** with different constraints, challenges and opportunities.

1. New GTM	• Startup or new product launch • Founder-led marketing, zero marketing investment
2. Sales-Led	• Sales is the primary revenue drive • Marketing is a support function, less than 10% Marketing generated pipeline
3. Nascent Marketing	• Marketing investment less than $300K, Marketing team is 1-3 people • 10-15% Marketing generated pipeline
4. Some Marketing Impact	• Marketing contribution to pipeline at roughly 15-25% • Marketing team is 4-7 people
5. Sophisticated Marketing	• Marketing contribution to pipeline at 25-50% plus • Marketing team is larger than 10 people

Continuum of Marketing Maturity



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Pyramid to Marketing Sophistication

To drive **pipeline and revenue growth**, Marketing needs to build 5 critical layers to reach sophistication.

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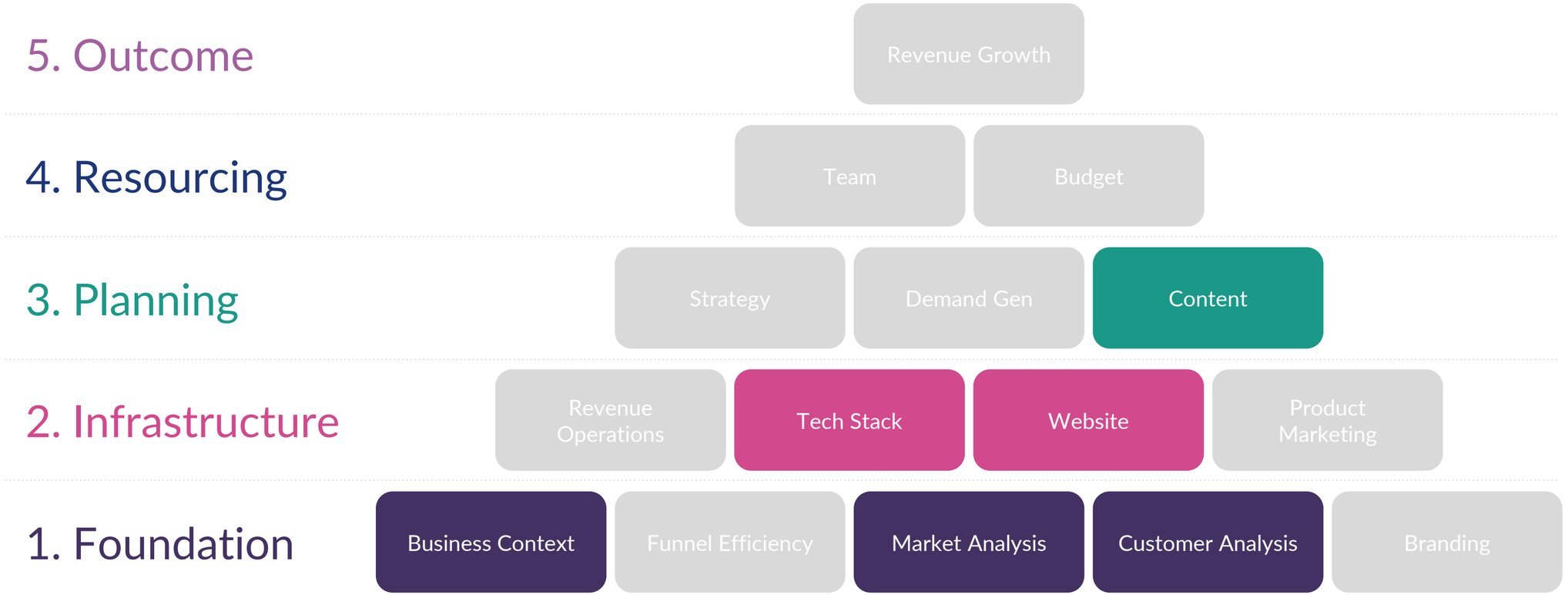
At-Risk Companies

Companies with **unpredictable Marketing contribution and insufficient revenue impact** often skip some or all of critical layers.



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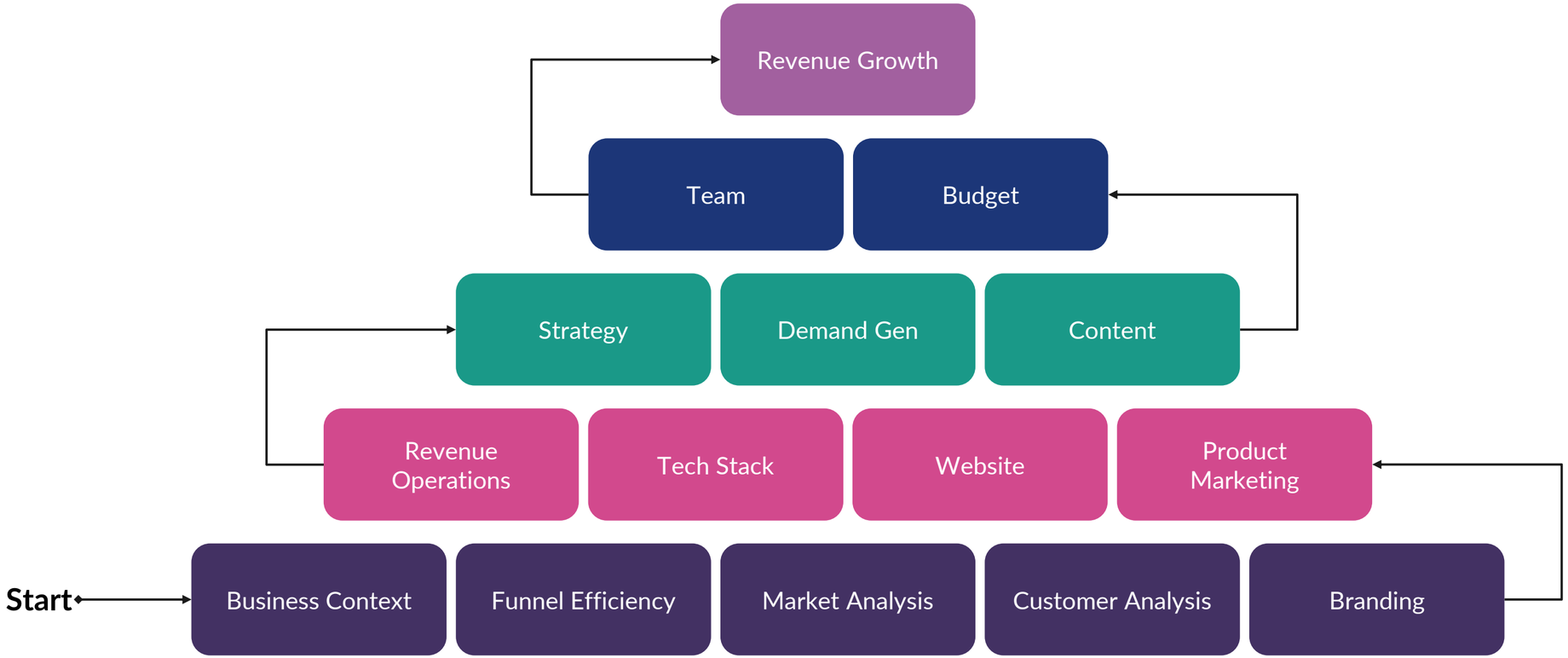
The Right Approach

Work through each layer, brick-by-brick,
to build Marketing into a sophisticated revenue-growth engine.



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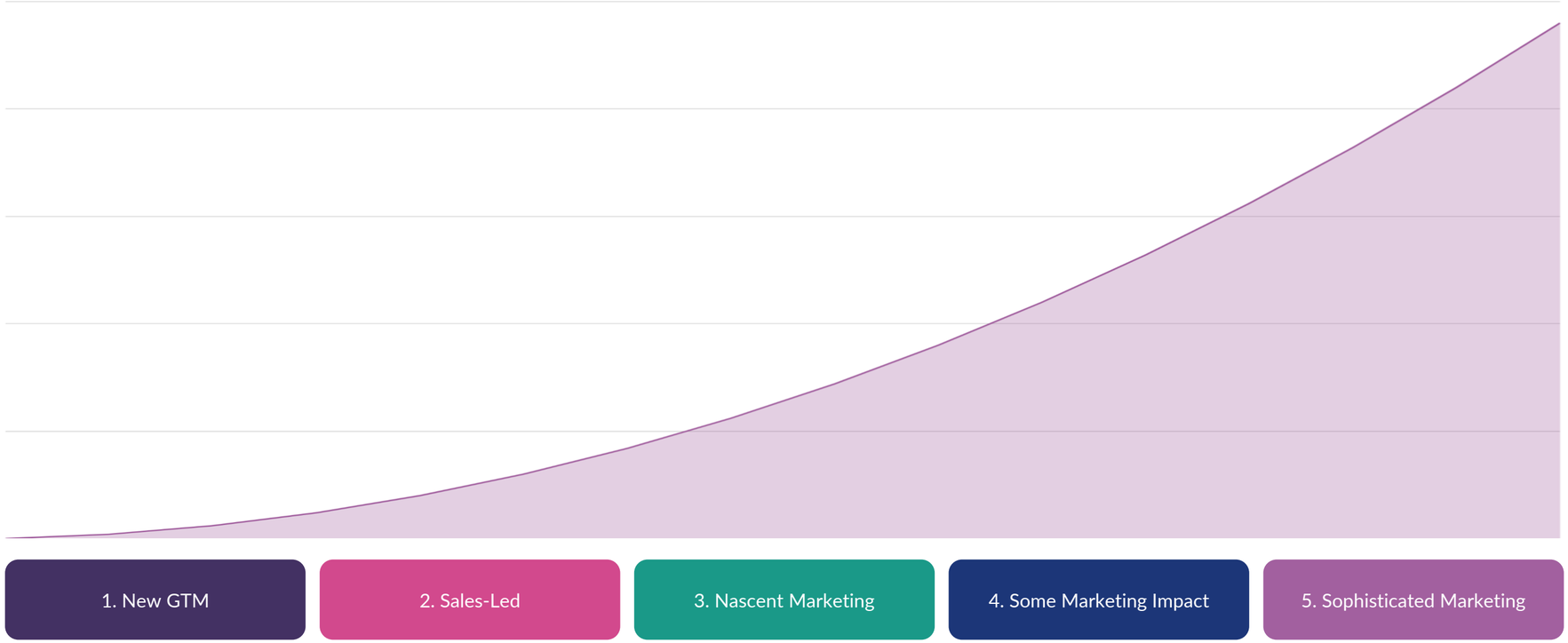
Revenue Impact

Companies that spend time working through all the layers increase Marketing's **contribution to revenue exponentially**.



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Urgency

Companies in certain situations have **added urgency to work their way through the layers** to increase Marketing's contribution to pipeline.

New Acquisition

New investment where Marketing needs to scale in the first 100 days to increase pipeline contribution.

Prep For Sale

Companies and founders getting ready to exit their business to strategic or financial investors.

M&A Platforms

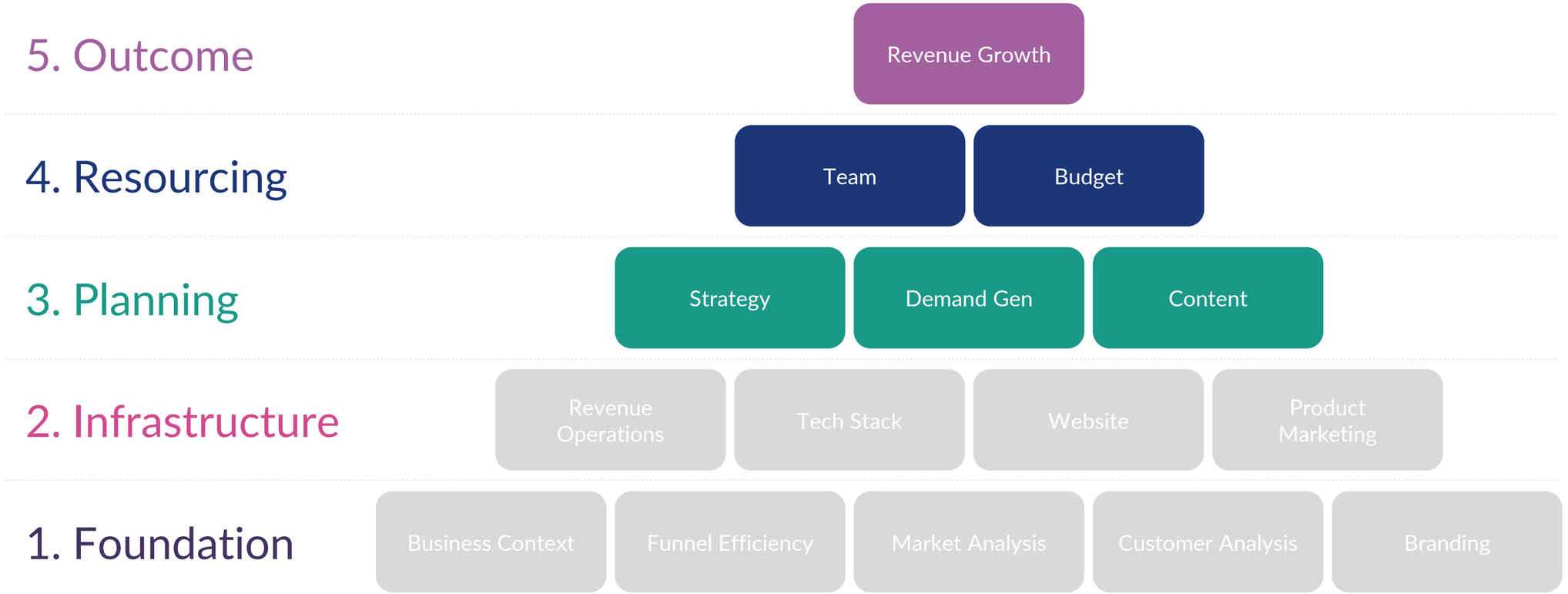
Bringing together multiple companies into a single platform, with add-on companies each quarter.

Transitions

Companies where teams, leadership, strategy and positioning have changed.

Getting to Revenue Growth

Delivering on the top 3 layers as quickly as possible is the key to driving revenue growth.



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5-Step Process for Scaling

The goal is to drive **additional Marketing contribution to revenue** and eventually increase our overall Marketing budget.

1. Build the Right Strategy → 2. Data Ops and Analysis → 3. Demand Gen and Content Roadmaps → 4. Team and Org Structure → 5. Budgeting and Financials

1. Building The Right Strategy

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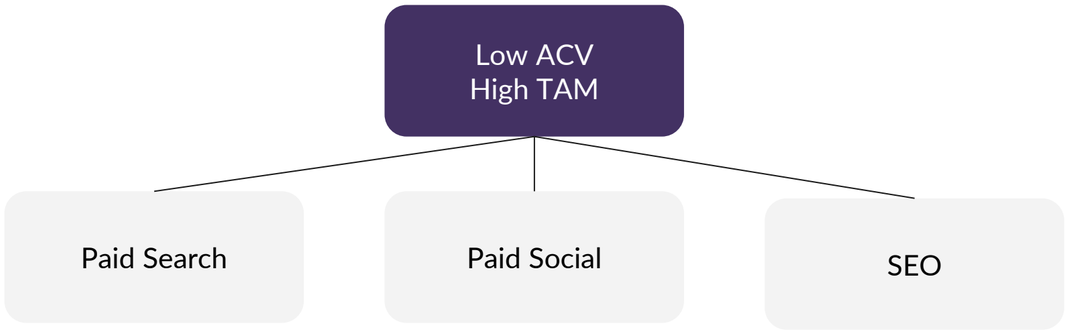
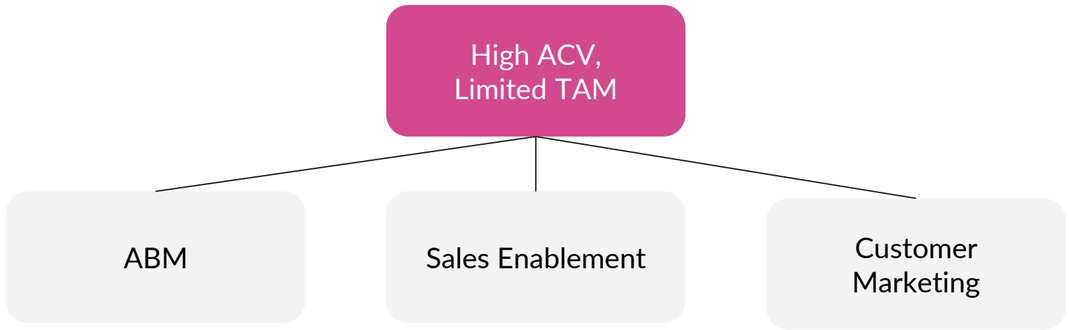
Building the Right Strategy

Depending on the specifics of a company's business model,
an entirely different strategy needs to be the focus.





Mapping Opportunities

Depending on the specifics of a company's business model,
an entirely different strategy needs to be the focus.

Low ACV High TAM	
Increasing Website Traffic	Drive more organic and paid media traffic to increase inbound free trials and demos.
Increase Trial to Paid Conversions	Convert more customers from Free Trial to Paid with better onboarding and automation.
Payments Volume	Get more customers onboarded onto our payments platform to capture rev share.

High ACV, Limited TAM	
Cross-Sell Existing Base	Expand existing accounts by cross-selling and upselling additional solutions.
Target Dream 100 Customers	Run targeted 1-to-1 marketing campaigns focused on our largest target customers.
Pricing Increases	Increase expansion revenue and net revenue retention with annual pricing increases.

Marketing Focus by Business Model

ACV	Paid Media	SEO	ABM	Customer Marketing	Product Marketing	Corporate Marketing	Marketing Ops	Sales Enablement
< $1K								
$1-5K								
$5-50K								
$50-300K								
$300K+								

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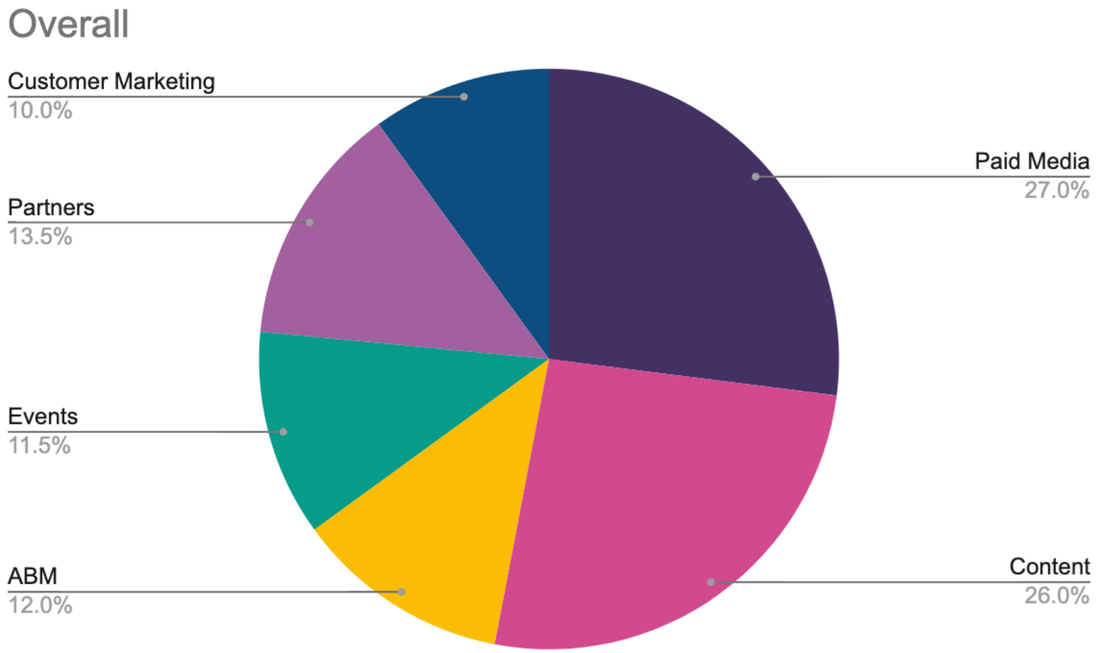
Overall Marketing Breakdown

Your overall Marketing Budget should be based on the **biggest revenue growth opportunities**.



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2. Marketing Data Analysis

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Build MQL-to-Close Reporting

Marketing needs to work backwards to know how many leads are needed **to get 1 closed won deal.**

Conversion Rates

Understand conversion rates across the funnel, from Lead to MQL to SQL to Closed Won **to understand your overall efficiency.**

Leads	Lead to MQL %	MQLs	MQL to SQL %	SQLs	SQL to Win %	Closed Won
115.34	14.11%	16.28	18.54%	3.02	33.15%	1.00
					MQL-to-close:	**6.14%**

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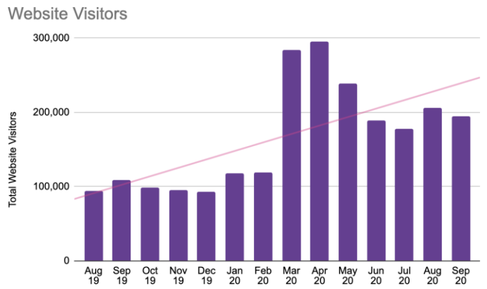
Understand Funnel Efficiency

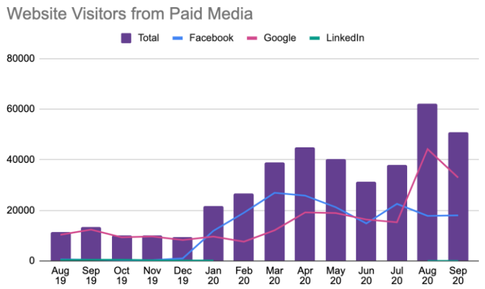
Analyzing funnel metrics identifies where
improving conversion rates can increase revenue impact.

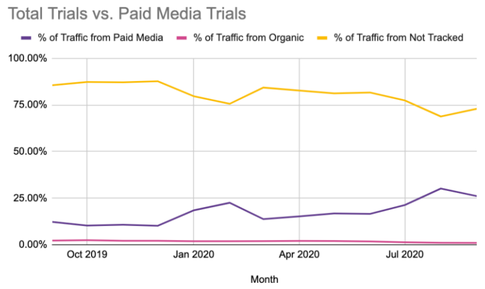
Spend	$70,000
MQLs	120
Opportunities	13
MQL to Opp Rate	11%
Cost / Opportunity	$5,400
Closed Won	4
Close Rate	31%
Average Deal Size	$12,000
CAC	$17,500
Payback Period	18 months

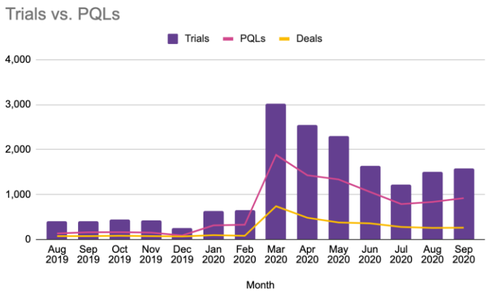
Full funnel analysis

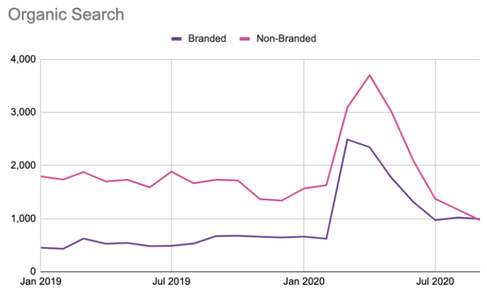
Analyze the full marketing funnel from website visitors to Closed Won through every stage of the funnel (MQL, SAL, PQL, SAL, Closed Won)

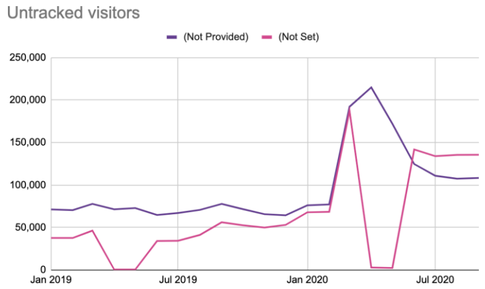


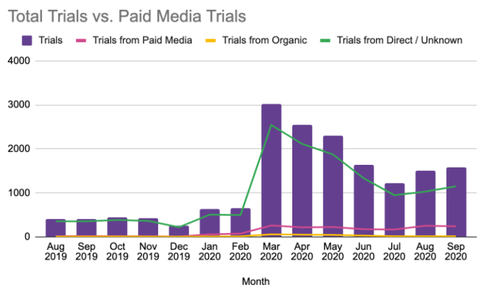


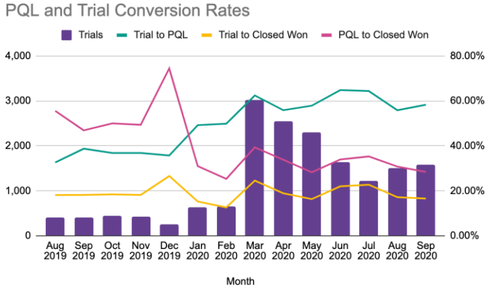












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Acceptable Cost Per Lead

Based on Conversion Rates, **identify the right baseline** for your Acceptable Cost Per Lead.

CAC Break Even Point	Cost/MQL
Month 10 (current)	$169.29
Month 12	$205.95
Month 15	$257.44

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Channel Analysis

Understand performance of channels by understanding impact on revenue and using Acceptable Costs / MQL as a baseline.

	Acceptable Cost / MQL	Actual Cost per MQL	Net Difference	Recommendation
Advertising	$57.15	$218.53	-$161.38	Scale down
Channel Based	$308.69	$209.65	$99.04	Maintain
Online Events	$193.01	$72.38	$120.62	Scale up
Physical Events	$207.74	$259.68	-$51.94	Scale down
Google PPC	$271.10	$142.69	$128.42	Scale up
Social Media	$78.45	$12.06	$66.38	Maintain

Campaign Analysis

Understand **highest Pipeline ROI by campaign**. Uncover significant inefficiencies from poorly performing campaigns that can reallocate spend.

AdGroup/Campaign	Sum of Cost	Sales Qualified	Evaluating	Pricing & Approval	Closing	Total Pipeline	Average Pipeline $ per Opp	Total Closed/Won $	Pipeline $ + Closed Won $	Pipeline + Closed Won $ / $ invested
Download	$1,947.57					$0.00	$0.00		$0.00	$0.00
Branded	$9,434.47		$5,124.92		$24,000.00	$29,124.92	$3,236.10	$26,000.00	$55,124.92	$5.84
Data	$31,972.44			$8,200.00		$8,200.00	$2,733.33	$11,933.00	$20,133.00	$0.63
Website Tracking	$4,390.46	$20,000.00				$20,000.00	$3,333.33		$20,000.00	$4.56
Desktop Varient	$4,820.58					$0.00			$0.00	$0.00
Files Varient	$1,476.05					$0.00			$0.00	$0.00
Keyword Cluster A	$3,385.83					$0.00			$0.00	$0.00
Keyword Cluster B	$83,676.18	$22,000.00	$9,462.48			$31,462.48	$1,498.21		$31,462.48	$0.38
Network Varient	$8,830.49		$25,000.00	$8,200.00		$33,200.00	$11,066.67	$9,308.00	$42,508.00	$4.81
New Page Varient	$37,066.60		$30,000.00			$30,000.00	$7,500.00		$30,000.00	$0.81
Spanish Downloaded	$4,789.40					$0.00			$0.00	$0.00
Competitor 1	$18,790.80					$0.00	$0.00		$0.00	$0.00
Branded v2	$59,662.71	$63,429.00	$48,000.00			$111,429.00	$18,571.50		$111,429.00	$1.87
Competitor 2	$8,152.20					$0.00			$0.00	$0.00
Retargeting	$67,438.36	$8,200.00				$8,200.00				
Total	$270,243.57	$106,290.60	$151,187.40	$14,400.00	$24,000.00	$295,878.00	$4,483.00	$47,241.00	$343,119.00	$1.27

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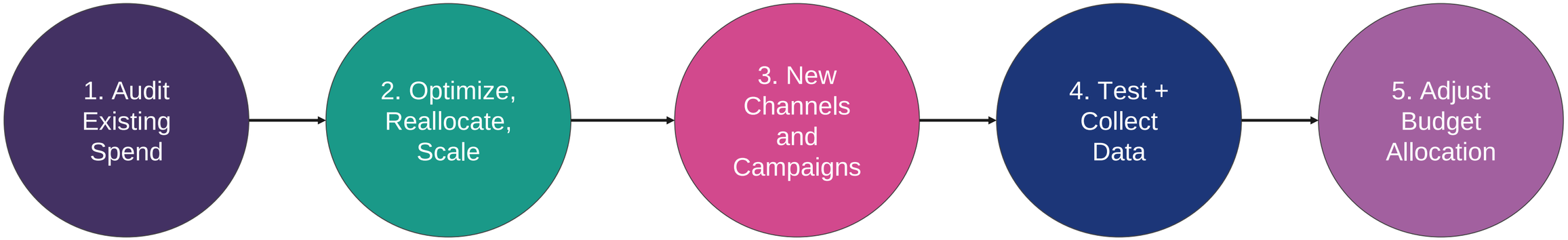
Process to Scale



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3. Demand Gen and Content

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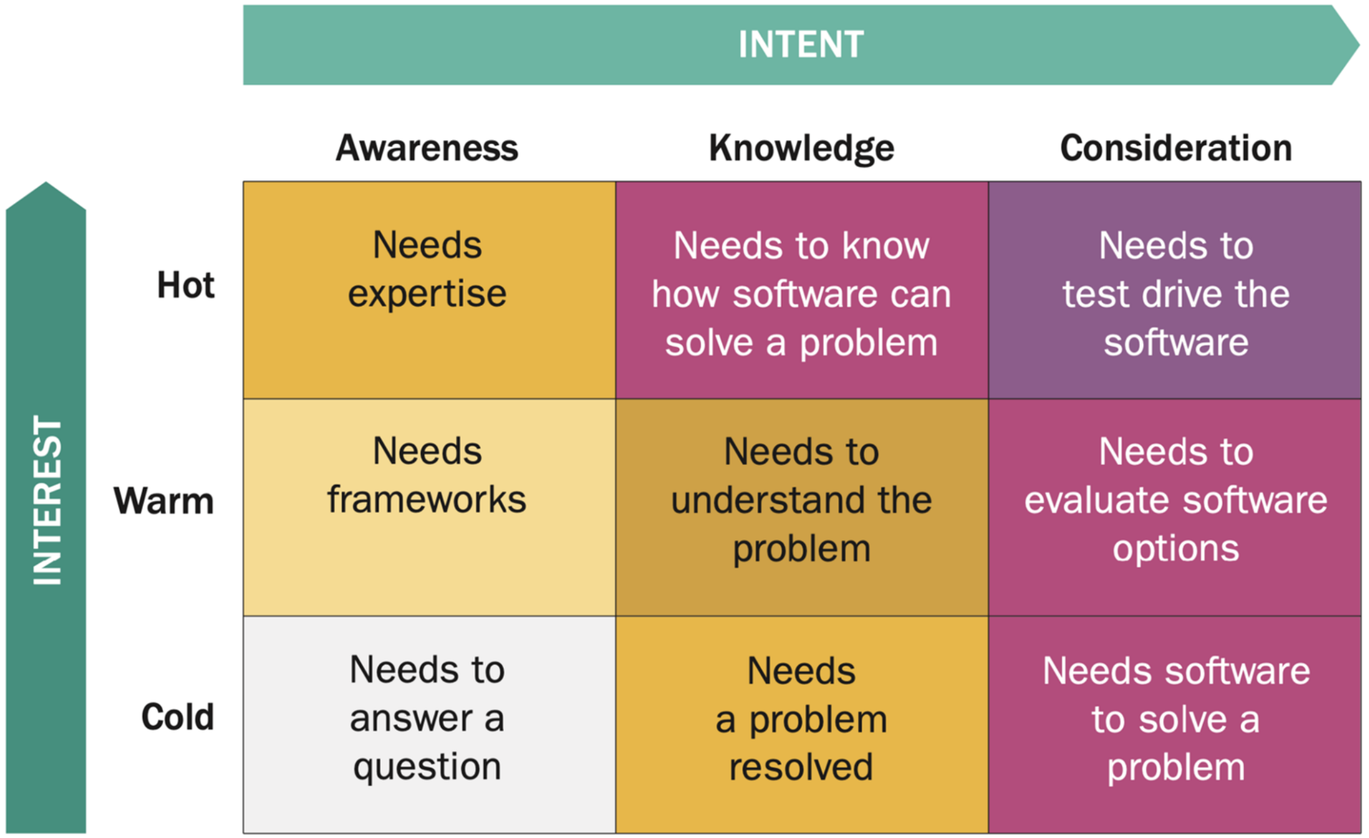
Needs at each stage



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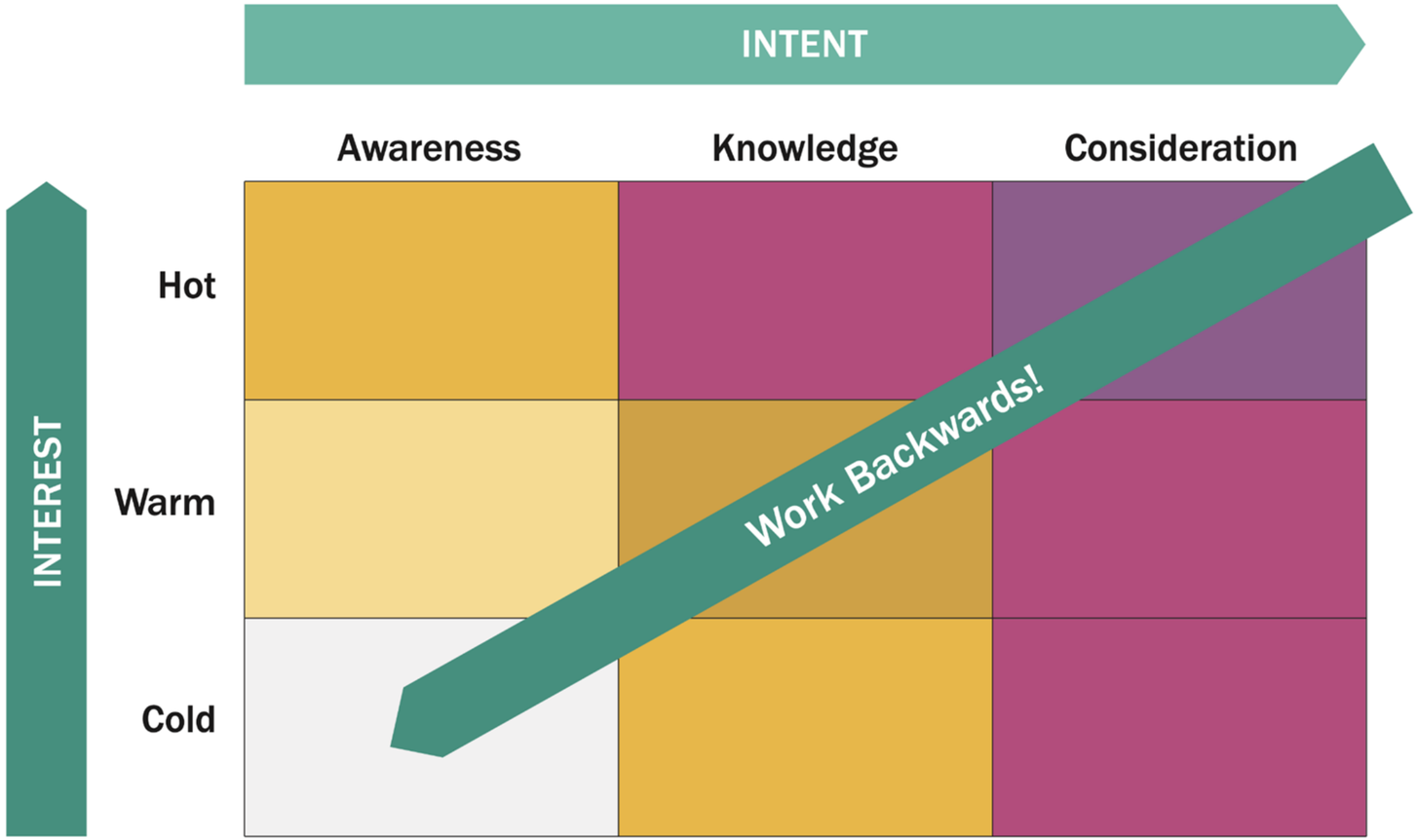
Order Matters



Scaling channels

Work backwards on every channel

Unaware	Awareness	Knowledge	Consideration
Needs to be made aware	Needs information	Needs nurturing and guidance	Needs to evaluate and make a decision

Channel 1
Channel 2
Channel 3
Channel 4
Channel 5

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Sub-Functions of Marketing

Depending on an organization's maturity and business model, **the most-relevant sub-functions** of Marketing are different.

Demand Generation	Programs and campaigns focused on driving pipeline.
Content Marketing	Creating content for every stage of the buyer journey.
Customer Marketing	Driving upsells and cross-sells from the existing customer base.
Product Marketing	Educating customers on the product to improve usage and retention.
Corporate Marketing	Brand, Communications, Events and PR activities.
Marketing Operations	Build the data infrastructure and reporting on performance.
Sales Enablement	Supporting the Sales team with the right collateral to close more deals.

Identify Opportunities to Scale

Channel	Cost	Leads	Demos	Opps	Closed Won	Closed Won ($)	ROI
Google	$14,129.70	9	24	8	2	$22,074	1.56
Capterra	$5,771.75	12	10	1	2	$15,976	2.77
LinkedIn	$2,111.53	25	?	0	0	$0	0.00
Facebook	$1,945.94	157	?	0	0	$0	0.00
Total	**$23,958.92**	**$203.00**	**$34.00**	**$9.00**	**$4.00**	**$38,050.00**	**1.59**

Channel	Google	Capterra	LinkedIn	Facebook	Total
Monthly Investment	$25,000	$15000	$5,000	$5,000	**$50,000**
Annual Investment	$300,000	$180,000	$60,000	$60,000	**$600,000**

Identify Opportunities to Scale

Asset Type	Current Status	Recommendation	Priority
Video case studies	None	Create additional case studies with focus on ROI and localization — aim for one new video case study for each main market per quarter.	**High**
Full pitch deck	None	Create full pitch deck for sales team to introduce all product lines.	**High**
How-to videos	Some but not all product lines	Create product how-to videos; aim to create one per quarter, prioritizing core functionality.	**Medium**
Product intro videos	Not for all product lines	Create intro videos to all products for sales to distribute; aim to create one per quarter.	**Medium**
Services team case study	Case studies do not focus on core services	Create case studies that prioritize services team's work to support sales process; aim to create one per quarter.	**Medium**

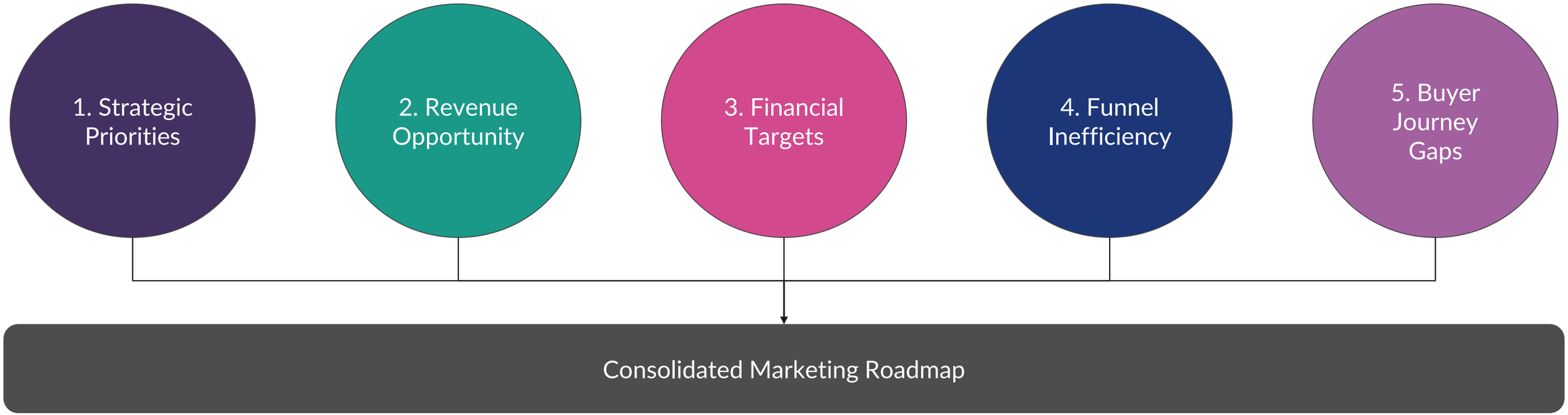
Mapping Revenue Opportunity

Based on the company strategy, mapping the revenue opportunities for each driver **reveals where the focus for Content should be.**

Initiative	Investment Required	Revenue Opportunity	ROI	Time to ROI	Likelihood of success	Risk Level
Payments Platform	$200,000	$1,500,000	7.5	18 months	High	Low
Partner Program	$100,000	$200,000	2.0	24 months	Low	Medium
Dream 100 accounts	$1,000,000	$10,000,000	10.0	18 months	High	Medium
Cross-sell / Upsell	$500,000	$2,500,000	5	12 months	High	Low

Consolidated Roadmap

Use the 5 step process to build out a
Consolidated Marketing Roadmap.



4. Team and Org Structure

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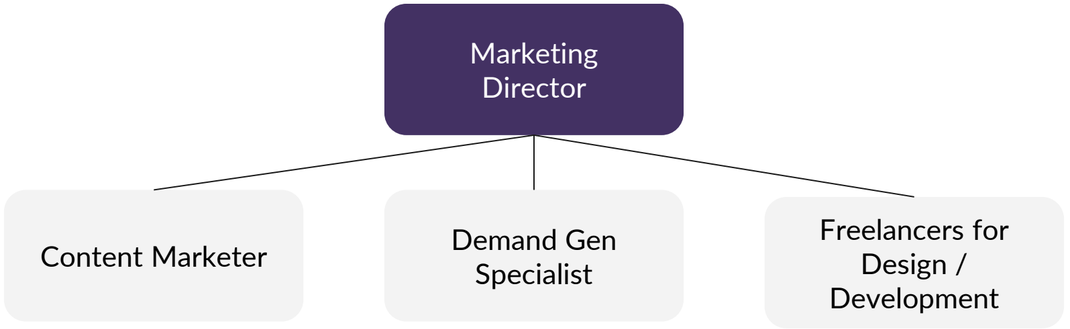
Phase 1 (MVP) Marketing Organization



Phase 2 Marketing Organization

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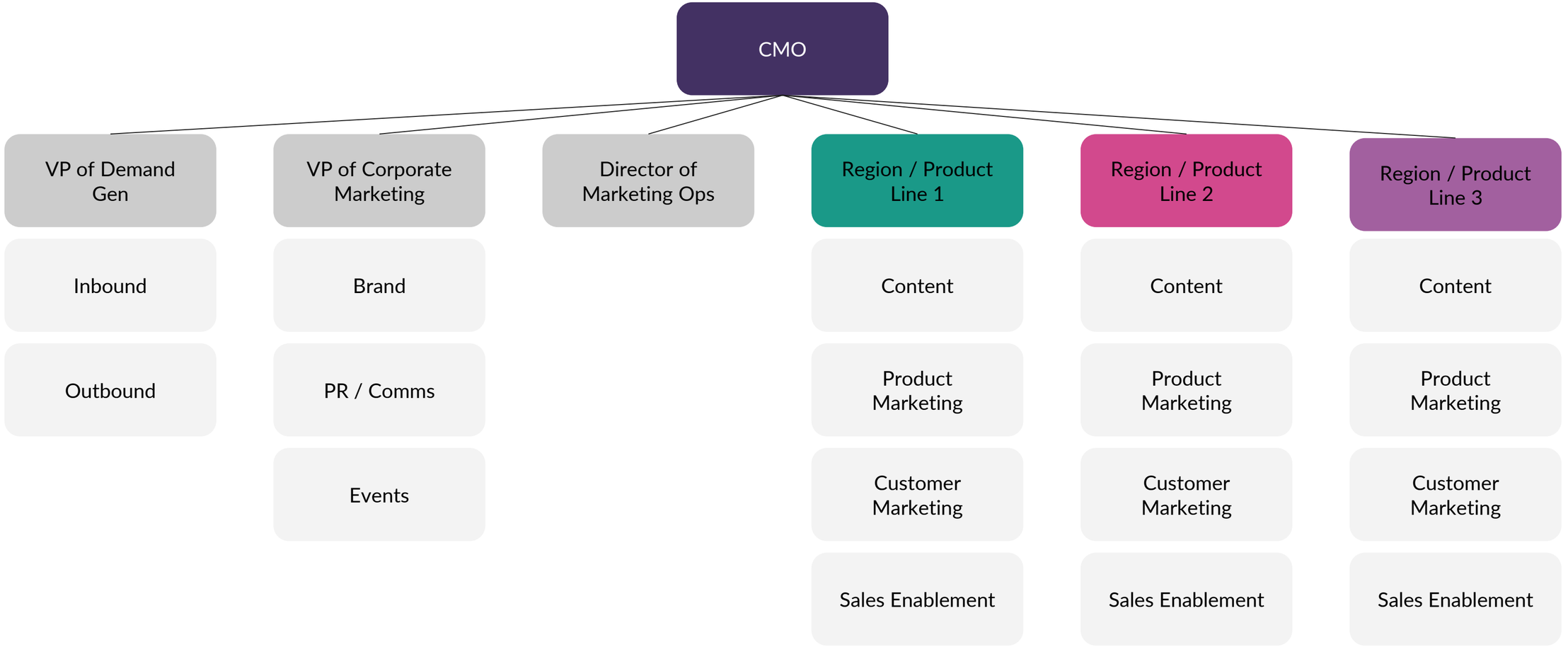
Phase 3 Marketing Organization



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Hiring Roadmap

Identify **core roles that need to be filled** to scale the marketing.

Phase	Role	Responsibilities	Salary
1	Marketing Director	Lead all marketing activities	$100-120K
2	Paid Media Agency	Supports execution on paid media platforms	$50-60K
2	Marketing Ops Manager	Manages marketing stack, data and automation	$60-70K
3	Content Manager	Leads all content activities	$80K
3	Demand Gen Manager	Leads all demand gen activities	$80-100K
4	SEO Specialist	Creates SEO content to increase organic traffic	$50-60K
4	Content Creator	Creates nurture and thought leadership content	$50-60K
4	Product Marketer	Creates product marketing content	$60K

5. Budgeting and Financials

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Marketing Pipeline vs. Budget

Marketing Generated Pipeline target for 2021 is declining compared to previous years. Meanwhile, it's budget has increased significantly.

	2019	2020	2021
Marketing Generated	$77,898,878	$62,408,140	$59,438,078
Sales Generated	$50,772,897	$58,343,940	$52,367,554
Channel Generated	$7,973,545	$41,236,712	$39,553,954
Total	**$136,645,320**	**$161,988,792**	**$151,359,586**

	2019	2020	2021
Marketing Budget	$3,335,000	$3,762,000	$5,415,000
Pipeline $ / Budget	23.36	16.59	10.98

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Analyze Marketing Budget Needed

Understand **marketing budget needed** to hit bookings targets

Q3 2020	
Won	$12,406,000
Won Deals	2,304
SQLs Needed	14,203
MQLs Needed	64,252

Q4 2020	
Won	$18,632,000
Won Deals	3,420
SQLs Needed	23,021
MQLs Needed	83,402

	Q3	Q4
Bookings	$12,406,000	$18,632,000
MQLs Needed in previous quarter	56,039	83,402
Actual MQLs in previous quarter	41,303	69,853
Difference	- 30.28%	- 17.68%

Integration & Efficiencies

Identify core efficiency areas **to scale marketing performance** while reducing spend.

Adjustment	FY21	FY22
Reduce general Advertising	↓	↓
Reduce PR	↓	↓
Increase Content Investment		↑
Reduce Headcount	↓	
Add PPC Agency		↑
Increase Paid Media Spend		↑
Reduce Physical Events spend	↓	↓
Increase Online Events spend		↓

Forecast Budget needed

Forecast Budget needed to support Bookings Targets.

	2020	2021	2022
Bookings Target	$7,517,396	$8,624,812	$9,743,660
Closed Won	3198	3670	4146
SQLs Needed	7996	9174	10364
MQLs Needed	13326	15288	17272
Budget needed at $150/MQL	$1,998,822	$2,293,276	$2,590,770

Timeline of budget adjustments

Understand **timeline of adjusting marketing investment** going forward

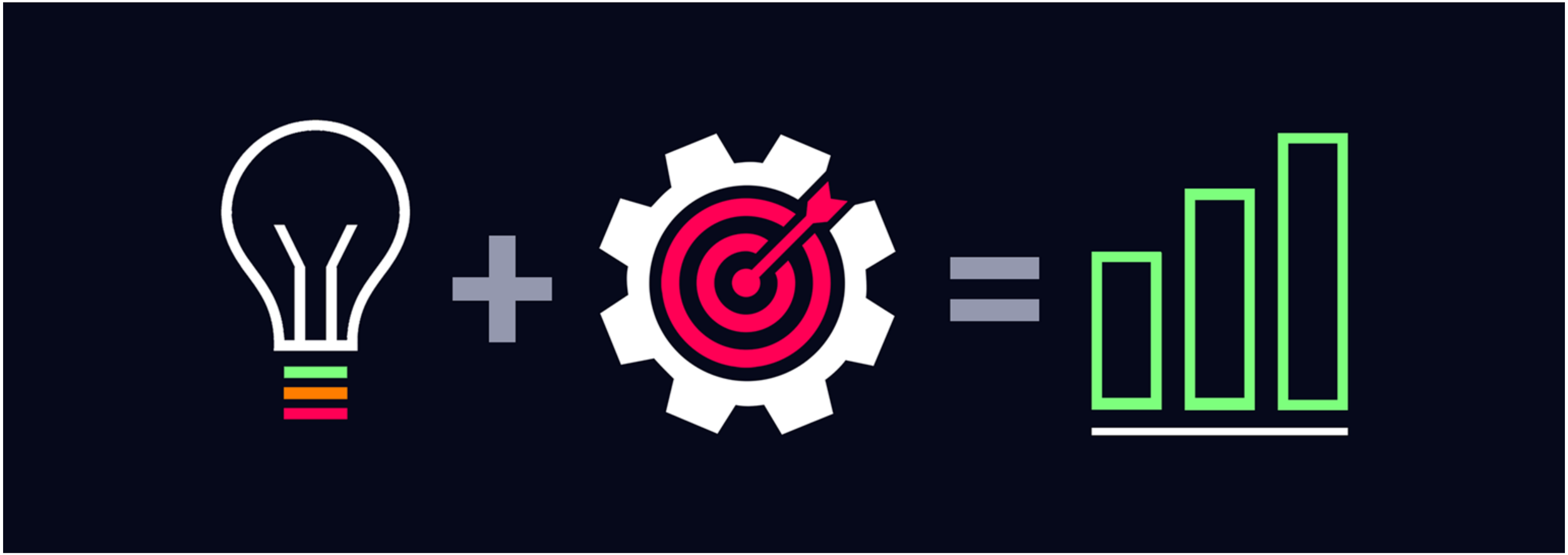
Adjustment	Q1 2022	Q2 2022	Q3 2022	Q4 2022
Implement Full Funnel Tracking				
Build attribution for Uncategorized visitors				
Improve Paid Media efficiency				
Scale Paid Search				
Scale Paid Social (FB, LI, YT)				
Scale Marketing Team				
Scale Content production (blog, webinars, podcast, SEO)				

Tying Budget to Strategic Opportunities

Map additional Budget asks to the overall strategy and **how Content will help deliver** on those priorities.

Initiative	Investment Required	Revenue Opportunity	Budget Ask	Details
Payments Platform	$200,000	$1,500,000	$80,000	1 Product Marketer
Partner Program	$100,000	$200,000	None	N/A
Dream 100 accounts	$1,000,000	$10,000,000	$500,000	2 ABM Marketers, Paid Media spend
Cross-sell / Upsell	$500,000	$2,500,000	$80,000	1 Customer Marketer

The end goal: be scientific about marketing



Q&A

Contact

How to get in touch with us:

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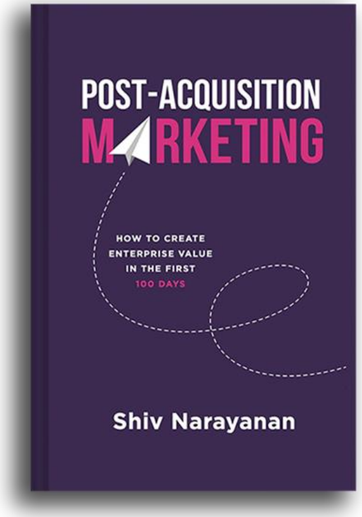
- Email: shiv@howtosaas.com
- LinkedIn: https://www.linkedin.com/in/shiv-n22/

About Shiv



Founder & CEO of How To SaaS

- Advisor and Partner of over 50 PE firms and their portfolio investments
- Part-time CMO / Consultant to over 100 companies doing up to $800M in revenue

Author of Post-Acquisition Marketing

- #1 Bestseller in Business, Marketing and Private Equity
- Available on Amazon, Apple Books, Audible, Barnes & Noble

Former CMO of Wild Apricot

- Grew to $20M in ARR
- Sold to Rubicon TP in 2017
- Sold to Pamlico Capital in 2018

How To SaaS is my first call when my investments need help with scaling their marketing efforts.

Mike Libert
Director at TA Associates

How To SaaS turned our Marketing into a force-multiplier for revenue growth.

Bill Hayes
CEO of Top of Mind

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