

# A roadmap for driving growth as a SaaS CFO

Sage

Scaling a SaaS startup isn’t just about increasing cash flow and capturing market share. Long before that can happen, you need to make sure that your product resonates with the market and your revenue engine works.

As a CFO, your role is crucial in navigating these early challenges and positioning the company for growth. It’s important to minimize the time you spend on manual tasks so that you can maximize your strategic impact.



## Here’s your roadmap to making it happen.



### 1 Automate your finance tech stack

We all get enamored with rapid growth but don’t fall into the trap of scaling manual processes just because that’s how you’ve always done it. Embracing automation frees you from chasing data and fixing spreadsheets. Focus on strategic initiatives that will truly move the needle, such as identifying new market opportunities and improving customer retention tactics.



### 2 Launch one of 500+ recurring billing models

Annual renewals are out. Instead, you need flexibility to handle contract amendments, upgrades, and more. Use real-time data to monitor key metrics like Churn MRR and Downgrade MRR, automate your renewal process, and implement loyalty programs to boost customer lifetime value (CLTV). Doing this lets you spot potential churners before they even think about leaving.



### 4 Integrate for speed and consistency

Turn sales into cash quicker by integrating your systems. Break down silos and eliminate bottlenecks in your workflow. This way, you can focus on celebrating new wins—not overcoming new obstacles.



### 3 Streamline rev rec and SaaS metrics

As your business scales, you’ll face a tough choice—new systems or increased headcount. To continue fueling growth, you need automated end-to-end revenue recognition with a compliance framework that grows with you, ensuring you’re always ASC 606 compliant.



### 5 Prove sustainable growth through IPO

It’s important now to show enduring momentum. Strike the right balance between retaining existing clients and acquiring new ones. By presenting metrics that illustrate both customer loyalty and market expansion, you’ll show that you’re ready for the next round of funding—or your IPO.



## You’re not just a CFO, you’re a growth catalyst

As a forward-thinking SaaS CFO, you’re here to drive your company’s success. Here’s how the right technology can empower and maximize your impact:



#### See the whole picture

No more piecing together data from multiple sources—you’ll be the go-to strategic advisor your CEO can’t live without.



#### Scale your impact, not your workload

From seed to IPO, find a scalable platform that grows with you. Handle increasing complexity without increasing your team size.



#### Turn data into dollars

Uncover insights that drive business performance and make your company’s value proposition very clear to investors.



#### Walk the SaaS talk

Impress investors, guide your board, and steer your company with SaaS-focused KPIs.



#### Stay compliant (and sleep better)

Technology with built-in GAAP, ASC 606, and SOX compliance support, will mean you can spend less time worrying about regulations and more time strategizing for growth.



#### Accelerate your success

Find something that means you can start delivering value fast with quick ROI and 60-day implementation.

Learn how top SaaS CFOs drive growth at scale — get your free copy of “10 ways Sage Intacct helps SaaS CFOs catalyze growth” to become the strategic CFO your SaaS company needs.



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