

# CEO-Workshop

## *across the entire business*

6 artifacts produced in 2 days of work

CLIENT · UNDER NDA

## B2B SaaS · HR-tech

HEADCOUNT	240 FTEs
TTM REVENUE	\$8M
GOAL	\$12M ARR run rate in 9 months
FORMAT	2-day CEO-Workshop · 8 participants · onsite
DELIVERABLES	6 working docs · 90-day plan · 6-month roadmap

### INSIDE THIS SAMPLER

- / 01 Growth Map — 28 opportunities and leaks across the business
- / 02 ICE x P&L prioritization — top-5 picks · 5 deliberate drops
- / 03 Stress test — "AI course generation" through 4 challengers
- / 04 Initiative tree — CS-driven expansion · owner · budget · MVP
- / 05 90-day plan with week-1 day-by-day breakdown
- / 06 6-month roadmap — 3 phases · Series B in month 8

# Growth *map*

DAY 1 · 10:00-12:30 · AI-TOOL "GROWTH MAP"

28 growth opportunities and revenue leaks across the business. Each carries a rough \$ impact for the next 6 months. The map is the input for prioritization in Artifact #2.

## CS-driven expansion

4% vs 22% benchmark · biggest leak

## AI course generation

0 in product · competitor catching up

## Premium SKU

\$160/mo ceiling on 80% of base

## Time-to-value

11 weeks vs 4-week goal

## CAC by segment

Mid-market 4x SMB · misallocated

## Sales velocity

92-day cycle vs 60-day benchmark

## Pricing tiers

5 tiers · 3 unused

## Sub-12-mo retention

Cohort churn 11% vs 6%

## Expansion playbook

Not codified · CSMs improvise

## Outbound SDR motion

9 SDRs deployed · unproven ROI

## Partner program

0 deals from 4 partners

## CIS expansion plan

Discussed for 2 years · no resourcing

## Product for schools

Adjacent · unclear unit economics

## Marketing-Sales handoff

~30% lead loss at MQL→SQL

## Brand awareness in ICP

12% · below ARR-plan benchmark

## Customer feedback loop

No structured intake

## EBITDA margin

-8% · fixable in 6 months

## ML cost to serve

Cost per active +18% YoY

## Support automation

Tier-1 still manual · AI candidate

## Enterprise pricing

22% below market

## Win/loss analysis

Last review 14 months ago

## Sales enablement

No vertical playbooks

## Reference program

0 customer references active

## AE hiring plan

+6 AEs queued · unproven ROI

## Rebrand initiative

Proposed · low strategic fit

## Product analytics

Event taxonomy outdated

## EU compliance

Pre-work for Series B

## Founder-led GTM

CEO in 60% of deals · bottleneck

28 OPPORTUNITIES & LEAKS · EST. POTENTIAL OVER 6 MO

+ \$2.0M – \$2.7M revenue

# Prioritization *ICE x P&L*

DAY 1 · 14:00-16:00 · COLLABORATIVE WORK

All 28 points are run through Impact x Confidence x Ease, plus expected P&L impact over 6 months. Output: top-5 picks for investment + 5 deliberate drops.

## TOP-5 · WHAT WE INVEST IN

#	INITIATIVE	I	C	E	6-MO P&L IMPACT
1	CS-driven expansion playbook	8	8	7	+\$945K
2	AI course generation (MVP)	9	6	5	+\$690K
3	Premium SKU launch	7	8	8	+\$380K
4	Onboarding automation	7	7	6	+\$200K (Q3)
5	CAC reallocation to mid-market	8	8	9	+\$245K (Q3)

## DROPPED · WHAT WE DELIBERATELY DON'T DO

— CIS expansion	Adds 18% complexity for ~6% revenue lift. Delays Series B.
— Product for schools	Adjacent market · unit economics unproven · founder time-sink.
— +6 AE hires	ICE = 4.7 · CAC reallocation gives the same pipeline at lower cost.
— Rebrand initiative	Cosmetic · doesn't move any of the 3 main constraints.
— Partner program	Better revisited after Series B with a dedicated owner.

# Stress test *4 avatars*

DAY 1 · 16:30-18:00 · AI-TOOL "STRESS TEST"

Initiative under test: "AI course generation". Each of 4 challengers asks one sharp question. The aim is to surface blind spots before they become P&L problems.

## VISIONARY

If this works for everyone, what makes us defensible in 18 months? Where's the moat — proprietary content, model fine-tune, or distribution?

## INVESTOR

What are the unit economics at day 90? Cost-to-serve, gross margin, attach rate to existing seats. And v1 → v2 cost trajectory.

## OPERATIONS

Who reviews v1 output? How many humans in the loop? Failure mode: bad course generated, customer churns — recovery plan?

## SKEPTIC

And if it's just "fine"? Then we shipped a feature that adds noise to NPS while burning 6 months of engineering. Kill criteria at week 8?

RISK MAP · COUNTERMEASURES

### ✓ QA loop on v1 → fallback plan B

Manual review of the first 50 generated courses. Plan B: revert to curated content.

### ✓ Human review at scale → AI pre-check

AI pre-screens for hallucination and IP issues before human review.

### ✓ IP defense → licensed RAG stack

Only licensed source corpora. Provenance log for every output.

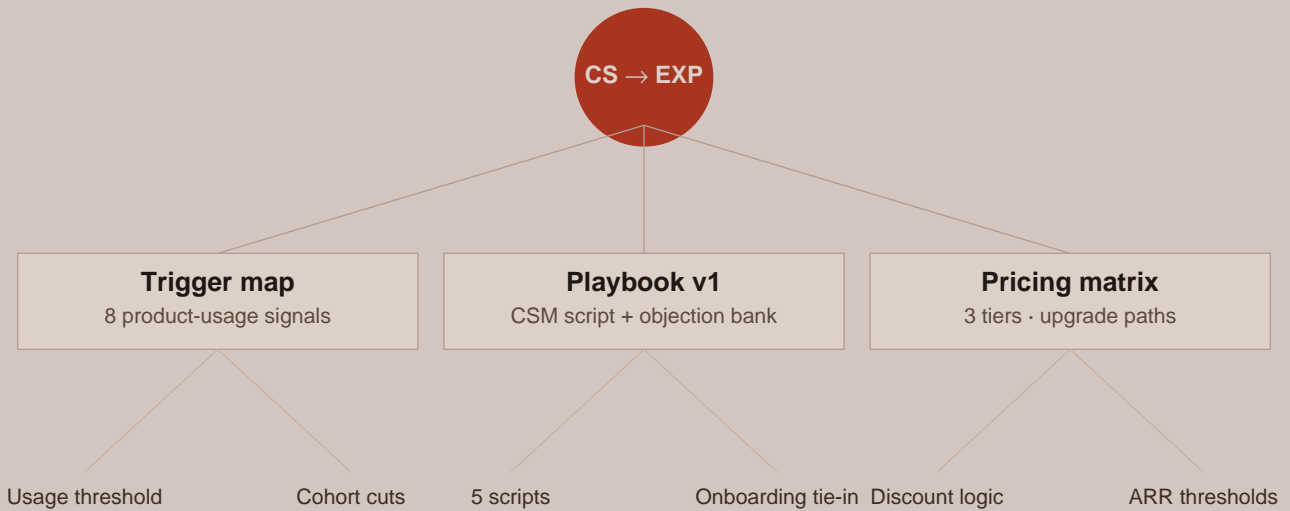
### ✓ Kill criteria locked at week 8

If NPS impact < +3 and attach rate < 12%, sunset and reallocate.

# Initiative *tree*

DAY 2 · 10:00-12:30 · CS → EXPANSION

Priority #1 broken down into actions, owners, metrics, and deadlines. Owner: CPO. Target: 18% net expansion rate by end of Q3. MVP in 4 weeks. Budget: \$9K.



OWNER

KEY METRIC

Q3 TARGET

MVP

BUDGET

FIRST CHECKPOINT

**CPO**

**Net expansion rate · monthly**

**18% (from 4% baseline)**

**4 weeks · shipped to production**

**\$9K**

**Week 4 · 25 CSMs enabled**

# 90-day *plan*

DAY 2 · 14:00-16:00 · WEEKS, OWNERS, CHECKPOINTS

WK 1-4

Setup · CS playbook v1 · AI MVP scoping

WK 5-8

AI v1 ships · Premium SKU launch · CAC reroute

WK 9-12

Onboarding automation · first expansion cohort

## WEEK 1 · BY DAY

MON	CPO + Head of CS — kickoff. List 8 product-usage triggers.
TUE	AI scoping with CTO — feature spec, RAG stack choice, IP review.
WED	Marketing — CAC reroute brief. Premium SKU positioning draft.
THU	CFO — Q3 P&L update with new initiatives. Series B prep checklist.
FRI	Team review · go/no-go on each track · publish 90-day plan to team.

## WEEKLY METRICS · WHAT WE TRACK

- Net expansion rate (CS-driven) · weekly
- Premium SKU attach rate · weekly
- AI course MVP — courses generated, NPS delta · weekly
- CAC by segment · monthly · EBITDA margin trajectory · monthly

# 6-month *roadmap*

DAY 2 · 16:30-17:30 · AI-TOOL "THINKER"

## M1-M2 · FOUNDATION

AI MVP shipped · CS playbook in use · Premium SKU live

## M3-M4 · ACCELERATION

Expansion engine running · CAC down 24% · TTV to 6 weeks

## M5-M6 · SERIES B PREP

Metrics packaged · raise materials · \$4.5M target at 3.5x valuation

### TARGETS BY MONTH 9

ARR RUN RATE	<b>\$8M → \$12M (1.5x)</b>
EBITDA MARGIN	<b>-8% → +6%</b>
NET EXPANSION RATE	<b>4% → 18%</b>
TIME-TO-VALUE	<b>11 wks → 4 wks</b>
SERIES B	<b>≥ \$4.5M raised at 3.5x valuation · month 8</b>
BURN RATE	<b>Down 22% via CAC reallocation + Premium SKU</b>

### CRITICAL ASSUMPTION

AI generation v1 ships by week 8 with acceptable QA. Slip &gt; 4 weeks = phase shift.

# Within 24 hours

## *a plan for your business*

- / 01 A 2-day workshop plan tailored to your needs
- / 02 A list of output artifacts — what your result looks like
- / 03 Recommended format and participants from your side
- / 04 A price range and what determines it

MESSAGE ON TELEGRAM →

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— Svetlana Vagner · AI-Adviser