

# SaaS CFO Services

Implement Best Practices in SaaS Finance & Accounting

## Benefits:

1. Your team is held accountable for key metrics that drive SaaS valuation.
2. Your company has implemented a best practice finance and accounting system.
3. You have a CFO business partner as you prepare for your next round of fundraising.

## Effective Two-Phase Process

### Phase I

9 to 12 months







- Monthly Reporting Package:
  - Financials
  - Forecast Model
  - Dashboard
- Implement SaaS Best Practice P&L Model
- Implement Subscription Management Software
  - Billing
  - Revenue Recognition
  - SaaS Metrics - MRR, Cohort, Churn/Net Retention

### Phase 2

Ongoing, Following Phase I

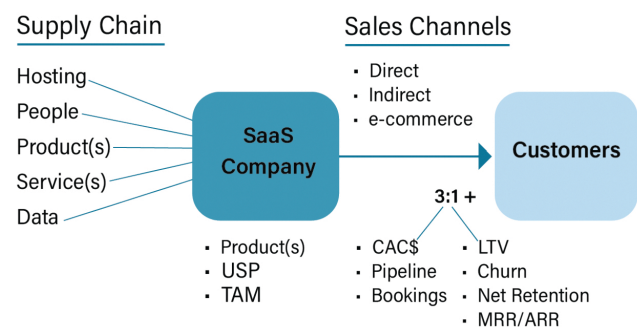
- Business Partner Role with Founder, Including Support During the Next Fundraising Round
- Mentor Accounting & Finance Staff
- Review Monthly Reporting Package

## SaaS Valuation Drivers Every CFO Should Measure\*

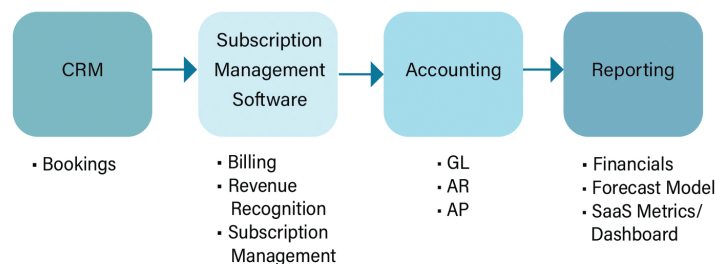
	Growth v Cohort	Size
	Retention	Logo & net \$
	GM/Unit Economics	LTV, CAC
	TAM	
	Profitability	Rule of 40
	CAC Efficiency	LT/CAC CAC Ratio

\*Source: SaaS Capital's How to Value a Private SaaS Company

## A CFO That Helps Optimize Your SaaS Business Model



## Implement a Best Practice SaaS Accounting & Reporting System



Looking for more information about best practices  
in SaaS Finance & Accounting?  
Contact Dave Lemon 402-679-9680