DEPTH & DIRECTION

ILLUSTRATIVE CLIENT DELIVERABLE

Sample SaaS Growth Initial Review

A focused decision brief for a fictional B2B SaaS business

FICTIONAL CLIENT	QUESTION	REVIEW FORMAT
Northstar Metrics	**Should we increase acquisition spend?**	**3 days over approximately 2 weeks**

Decision in one page

PROVISIONAL RECOMMENDATION

Do not materially increase acquisition spend yet.

Protect the activity that is already producing suitable trials, but first test whether avoidable friction in the first-value journey is suppressing paid conversion. The current evidence makes this the best next priority; it does not prove that onboarding is the only cause.

1. **Hold the incremental budget decision**
   Keep proven campaigns running. Delay the proposed 30% increase until the trial journey has been tested and source quality has been separated from conversion performance.

2. **Fix and measure one point of friction**
   Test a shorter path to connecting a live data source and publishing a first dashboard for one defined cohort.

3. **Return to the investment decision with evidence**
   Compare first-value completion and paid conversion against an agreed baseline, alongside lead mix, support demand and early cancellations.

This document shows the level of judgement and clarity a client should expect from the €3,600 Initial Review. All company names, interviews and performance data are fictional.

01 SOUNDING

The question and the evidence

Northstar Metrics is a fictional reporting platform for small B2B service firms. It offers a 14-day product trial. Leadership is considering a 30% increase in acquisition spend because trial volume has grown, while trial-to-paid conversion has fallen below its own recent baseline.

The commercial question

Is the fall in trial conversion mainly an acquisition-quality problem, a first-value problem or an expectation problem — and what should the business do before increasing spend?

Evidence reviewed

Input	What it can tell us	Limit
12-week funnel export	Where volume and conversion changed by source and stage	Historical association; no causal proof
Founder interview	Commercial context, targets and previous decisions	One leadership perspective
Growth manager interview	Channel changes, campaign choices and measurement gaps	No agency or prospect interviews
Customer success interview	Common setup questions and hand-off friction	Anecdotal; not a representative sample
Website and trial walkthrough	Expectation setting and the steps to first useful value	One product path on a point-in-time review

What this review can decide

- Which explanation deserves attention first based on the available evidence.
- Whether the proposed acquisition increase should proceed now, pause or be reframed.
- The smallest practical test that will improve the next decision.

What remains outside the evidence

No new customer or lost-trial interviews were completed. Attribution is incomplete across two smaller channels. The analysis therefore ranks explanations and specifies what to test; it does not claim statistical causality or forecast revenue uplift.

02 BEARING

What the funnel suggests

Trial volume is up, but the decline cannot be explained by channel mix alone. The larger signal appears after signup: fewer trials complete the two actions that define useful first value.

Fictional 12-week snapshot

Measure	Previous 12 weeks	Current 12 weeks	What changed
Trial starts	930	1,200	+29%
Trial-to-paid conversion	14.2%	9.1%	−5.1 pts
First-value completion	54%	38%	−16 pts
Paid-search share of trials	25%	42%	+17 pts
Paid-search conversion	10.4%	8.8%	−1.6 pts
Referral conversion	17.1%	16.5%	−0.6 pts

Three observations

1

Channel mix matters, but is not the whole answer

More trials now come from paid search, which converts below referral. Yet conversion also weakened within paid search, while referral conversion remained broadly stable.

2

The strongest change is before first useful value

Completion of the first-value event — connecting one live data source and publishing a dashboard — fell from 54% to 38%.

3

Activation and conversion move together

In the current period, 24% of trials completing first value became paid customers, compared with 3% of those who did not. This is a useful association, not proof that the journey caused the difference.

Interpretation: spending more now would buy additional trials into a journey that appears to be converting suitable users less effectively. A narrow activation test is a better next use of management attention than a broad acquisition increase.

Where the journey loses momentum

The website promises a live client dashboard “in minutes”. The product then asks a new user to choose a template, configure permissions, connect a data source and map fields before they can publish. The most material gap is between account creation and a successful live connection.

Journey review

Stage	Observed signal	Likely effect	Confidence
Promise	Fast time to a working dashboard	Sets a low-effort expectation	Observed
Template choice	Nine similar options before intent is known	Adds an early decision	Plausible
Data connection	Permissions and error messages use technical language	Can block non-technical users	Strong signal
First dashboard	Users must map fields before previewing value	Delays the payoff	Strong signal
Support hand-off	Help is reactive and not triggered by stalled behaviour	High-intent trials may remain stuck	Plausible

Ranked explanations

Rank	Working explanation	Current judgement	What would change the judgement
1	Suitable trials stall before first useful value	Most plausible. Supported by the larger fall in first-value completion, the walkthrough and CS evidence.	Cohort test shows no improvement in activation or paid conversion after friction is reduced.
2	New trials are a weaker fit	Contributory. Mix shifted toward paid search, but within-channel performance does not explain the full decline.	Segmented conversion shows most of the decline is confined to new audiences or terms.
3	Trial and price expectations are unclear	Unresolved. The website promise may understate setup effort; loss reasons are not captured consistently.	Lost-trial interviews or clean reason codes show expectation or price mismatch dominates.

The review does not collapse these into one answer. It identifies which explanation should be tested first and preserves the others as live alternatives.

Recommended priority

Improve the path to first useful value before materially increasing acquisition spend.

The aim is not to redesign onboarding. It is to remove one evidenced point of friction, measure the effect and give leadership a stronger basis for the next budget decision.

The first test

Cohort	New self-serve trials from paid search and direct traffic over an agreed four-week window.
Change	Offer a guided data-source connection path: recommend one template, translate permission steps into plain language and show a populated preview before field mapping.
Primary measure	Share of trials that connect a live source and publish a first dashboard within 72 hours.
Commercial measure	Trial-to-paid conversion, read after the full trial and payment window.
Guardrails	Support contacts per trial, connection errors, cancellations in the first 30 paid days and conversion by source.
Decision rule	Scale only if activation improves meaningfully without unacceptable support demand or weaker early retention. Agree the threshold after validating the baseline and sample size.

What happens to acquisition

- Continue activity that meets the current cost and quality thresholds.
- Do not release the proposed 30% incremental budget during the test window.
- Report source and segment performance separately so a journey improvement does not hide a quality problem.

The trade-off

This delays a potentially valuable spend increase by several weeks. In return, Northstar reduces the risk of paying to amplify a conversion problem and creates evidence that can improve both acquisition economics and the product experience.

Who needs to own it

Owner	Accountability	Estimated involvement
Product lead	Approve and ship the test experience	Named owner; 2–4 implementation days to confirm
Growth lead	Cohort definition, channel guardrails and reporting	Approximately 1 day plus monitoring
Customer success	Review guidance and monitor support impact	Two short reviews plus issue logging
Executive sponsor	Approve the pause and decide after results	Kick-off and decision review

03 COURSE

A 30-day evidence plan

The Initial Review ends with a bounded next step. This plan is enough to organise the test; detailed implementation, production and instrumentation would be confirmed by the client team or scoped separately.

When	Action	Owner	Decision evidence
Days 1–5	Validate event definitions, current baseline, cohort size and tracking. Confirm the test threshold.	Growth + data	Reliable baseline and feasible readout
Days 4–10	Design and build the guided connection path. Quality-check with CS and two internal novice users.	Product	Test ready without known blocking errors
Days 11–24	Run the defined cohort. Keep acquisition guardrails stable and log exceptions.	Growth	Activation, support and source-level data
Days 25–30	Read the result after the agreed window. Record limitations and make the budget decision.	Sponsor + team	Scale, iterate, investigate quality or stop

Decision at the end of the test

A

Increase investment

Activation and paid conversion improve, guardrails remain acceptable and source economics support additional spend.

B

Iterate the journey

Activation improves but paid conversion or retention does not. Investigate expectation, pricing and downstream fit before scaling.

C

Shift to acquisition quality

The journey change has little effect and the segmented evidence points to specific audiences, terms or sources.

Uncertainties to keep visible

- The historical relationship between first-value completion and paid conversion may reflect user intent as well as journey quality.
- A four-week cohort may be too small for a definitive result; the team should agree the minimum useful evidence before launch.
- Loss reasons remain incomplete. A small set of customer or lost-trial interviews may be the next best step if the test is inconclusive.

What a client receives

A focused review for one product, one primary market and one important commercial question. The work is designed for a leadership team that needs a defensible priority before commissioning a larger strategy or adding senior marketing capacity.

Included	Client contribution	Boundary
Founder/sponsor interview and up to two team interviews	Sponsor approximately 3 hours; team members up to 1 hour each	No broad stakeholder research
One funnel/cohort export, current plan if available, up to three existing recordings or notes	Provide existing material and an agreed data export	No new reporting system or causal model
Website and one key conversion or onboarding journey	Provide access needed for the walkthrough	No full product, UX or technical audit
Concise decision brief, workshop and one factual-correction round	Attend the decision workshop and confirm factual accuracy	No implementation or fully costed 90-day plan

Commercial structure

€3,600 fixed fee • three delivery days led by Stephen Dodd • approximately two calendar weeks once the agreed inputs are available

The client can stop with the brief, act internally, continue into the full Growth Strategy Sprint or discuss Fractional Marketing Leadership. There is no automatic continuation.

Continuation routes

Route	When it fits	Commercial structure
Full Growth Strategy Sprint	More evidence and a complete 90-day plan are needed to resolve and organise the priority.	€12,000 total including the Initial Review; €8,400 additional if continuing on the same scope.
Fractional Marketing Leadership	The direction is sufficiently clear, but the business needs senior ownership to lead decisions and delivery.	€5,600/month for 4 days or €10,400/month for 8 days; three-month initial term.

The standard to expect

Evidence before prescription. Trade-offs made explicit. A recommendation that distinguishes what is known, what is plausible and what still needs to be tested.

This is an illustrative sample, not a client case study. Northstar Metrics, its interviews and all performance data are fictional.

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