

# ROUNDTABLE DISCUSSIONS

SESSION 1 | 12:45 – 1:30 PM

## Unlocking Product Value that Drives Growth

*Ed Lee, HelloAdvisr*

Join us for a roundtable discussion as we dive into one of the most powerful growth levers available: pricing. A 1% improvement in pricing can increase the bottom line 3x more than a 1% improvement in volume, but remains one of most misunderstood and utilized by SaaS companies. Join pricing and monetization expert Ed Lee, Founder and CEO of HelloAdvisr as we focus on practical strategies and host an open discussion with SaaS founders on pressing pricing questions.

## Extending Your Runway in an Challenging Environment

*Ronette Kite, Countsy*

What are you doing to minimize cash burn, maximize resources, and extend runway in an uncertain environment? If you don't have quick answers to these questions you are putting your business at risk. Ronette Kite, Startup CFO at Countsy, will help guide us through the questions you need to address in the early stages of growth.

## 5 Strategies for Monetizing SaaS Integrated Payments

*Pete Uselman, Wind River Payments*

This discussion is designed specifically for SaaS providers that enable users to process their customers' payments directly within their software. Most integrated payments providers will offer to share a percent of the payment revenue with their SaaS partners. But relying solely on that revenue share may be leaving significant income opportunities on the table. Join us as we explore 5 payment monetization strategies SaaS providers can implement to maximize their revenue from their payment integration.

## Scale to Sale:

### Building Your Business to be Exit Ready

*Dan Gramann, Cultivate Advisors*

Dan Gramann, Co-Founder of Cultivate Advisors scaled his company to hit Inc 5000 five years in a row, having served thousands of business owners on their subscription advising model. Dan leads a team of entrepreneurs that oversees over a billion dollars SMB revenue. In this discussion, you will learn the keys to best practices, but more importantly where to focus your attention in the years ahead to grow enterprise value. Whether you plan to sell your business next year or not for 20 years, these foundational principles deeply impact the success of your business.

## Get to Know Your Customer Agreement: Tips, Tricks & Mistakes to Avoid

*Jesse Saivar, Greenberg Glusker LLP*

Come sit with an experienced tech transactional lawyer to unravel the complexities of your customer agreement. Gain valuable insights on making your agreement work for you and steering clear of potentially costly missteps.

## When and Why to Use Venture Debt

*Rob Belcher, SaaS Capital*

Venture debt has been around since the beginning of the venture capital industry, but the recurring revenue model has incited the creation of many new, recurring revenue-specific debt and debt-like products. Here we will describe the classic venture debt use case and value proposition, as well as the pros and cons, and best uses of the new products.

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## Legal Challenges of Auto-Renew Subscriptions: Is Your Company Prepared?

**Shawn Collins, Stradling**

Join us for a discussion about the legal pitfalls of subscriptions and memberships that are offered on a recurring revenue basis. California and New York recently revised their Automatic Renewal Laws (ARL) in direct response to increasing consumer complaints about recurring subscriptions and memberships, and companies need to be aware of these new legal requirements and what they mean for the future of e-commerce.

## Every Company is a Fintech Company: How to Win your Corner of the Internet

**Casey Kipfer, Justifi**

Please join us for our roundtable discussion as we'll delve into the practical strategies that SaaS companies can employ to enhance their Annual Recurring Revenue (ARR) by more than 5x and increase their customer LTV by 10-50x through the integration of various fintech products such as embedded payments, lending and insurance. This session will focus on the nuts and bolts of implementation, equipping attendees with valuable insights to effectively monetize a range of fintech offerings.

## Selling with Design & UX

**Bartek Drozd, Kuula**

Is it possible to build a software product that is so intuitively designed that it "sells itself?" This could mean spending less on marketing and sales. But designing a "self-service" software solution is anything but simple. You will need to deeply understand your customer's needs first and then translate this knowledge into how your product works. This product-led design requires many iterations... and no, AI will not do that job for you!

## Nailing your Go-to-Market

**Chad Jardine, CMO Zen**

How has GTM evolved? What do you need to prep your GTM (Go-to-Market) foundations and get alignment across sales, marketing, and product? How do you find the right GTM motion? Can you correct a GTM false start? Learn from Chad Jardine, Founder/CEO of CMO Zen and 4 x SaaS CMO.