

AFTERNOON BREAKOUT SESSIONS

1ST SESSION 1:40–2:10 PM | 2ND SESSION 2:15–2:45 PM

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Term Sheets 101:

Cole Morgan and Sean O'Neill

The promise of new capital can make it all too easy for founders to sign on the dotted line without a full understanding of the agreement they just made. A high valuation alone does not protect founders' equity and it is especially important to pay attention to distributions from a future sale or liquidation event. Join a seasoned entrepreneur who has raised multiple rounds and an experienced attorney to break down the terminology and some negotiating tactics to consider when signing a term sheet.

5 Strategies for CFOs to Build Investor-grade Reporting

Taylor Brown

At a minimum, a modern billing and accounting system for SaaS, Software, or Technology companies should automate and streamline core financial management functions such as Accounts Receivable, Accounts Payable, and the financial close. But you can hardly fuel your growth and need for accountability and transparency by simply automating the minimum. SaaS firms, in particular, have revenue recognition, subscription billing, and SaaS and GAAP investor reporting needs that require specialized functionality in their financial management systems.

How Stories Help Leaders & Companies Scale, Pivot & Succeed

Justin Sternberg

As a founder you're constantly selling: to investors, to your board, to your partners, and to your employees. In this session you will learn the basics we use in Hollywood to build a great story so

you too can unlock the power of storytelling to tell more engaging, powerful, and effective stories.

The Outsized Effect of Net Revenue Retention: Discover its Impact and How to Improve It

You Mon Tsang

Net revenue retention (NRR) is taking center stage as the qualifying metric for determining the health of a SaaS business. You can demonstrate an amazing product, have an expert executive team, and show a top-tier growth trajectory, but without reasonable NRR, you will summarily get disqualified from funding consideration.

2ND SESSION 2:15–2:45 PM

Alternatives to Venture Capital: Options for Founders

Melissa Widner and Justin Renfro

Though venture capital has helped support the rapid explosion of startups over the last few decades, founders have increasingly become more inclined to seek out alternatives to fund their growing businesses. In this session we will explore two popular alternatives: venture debt and crowdfunding that allow for more control and much-needed capital to support your business.

ARR—What SaaS Leaders and Investors Need to Know!

Dan Fletcher and Sameer Gulati

ARR is arguably the most important metric that SaaS and cloud companies track. It drives sales behavior. It drives executive compensation. It drives investor valuations. Despite its importance in the SaaS industry, there is no standardized definition of ARR.

If you talk to finance leaders and investors you will find that there are a few different ways to calculate ARR as well as the associated metrics like expansions, contractions, and churn. Attend this session to understand how to discuss how SaaS companies should measure ARR.

The Hidden Growth Engine—Retention as Acquisition

Trace Galloway

For healthy subscription businesses, it's no longer enough to simply bring in net-new customers. You must nurture your connections with existing users to keep them happily subscribed, and consider "retention as acquisition".

Trace Galloway, Chief Strategy Officer at Vindicia, will discuss retention as a new growth engine and present key findings from the Total Economic Impact™, a commissioned study conducted by Forrester Consulting to see how customer retention tools can help B2C companies grow and optimize customer experience.

5 Tips to Boost AOV & LTV in Your Subscription Business

Erin Carey

Subscription Commerce is growing by 70% year over year. Consumers want to find new brands with a focus on quality and ethical business practices. In this session, Erin Carey from Recharge Payments will delve into 5 proven strategies to increase customer lifetime value and build a loyal community of subscribers. or-break in capturing an investor's attention and ultimately getting that check, but what are the little things (and the big things!) that make for that impactful pitch? Get your questions ready for startup funding strategist and expert Lisa Tsou of The Winning Pitch for a lunchtime AMA on pitching for investment.