

An aerial photograph of the San Francisco skyline at dusk. The Transamerica Pyramid is prominent on the left, with other skyscrapers and city buildings visible. The sky is a mix of purple, pink, and blue.

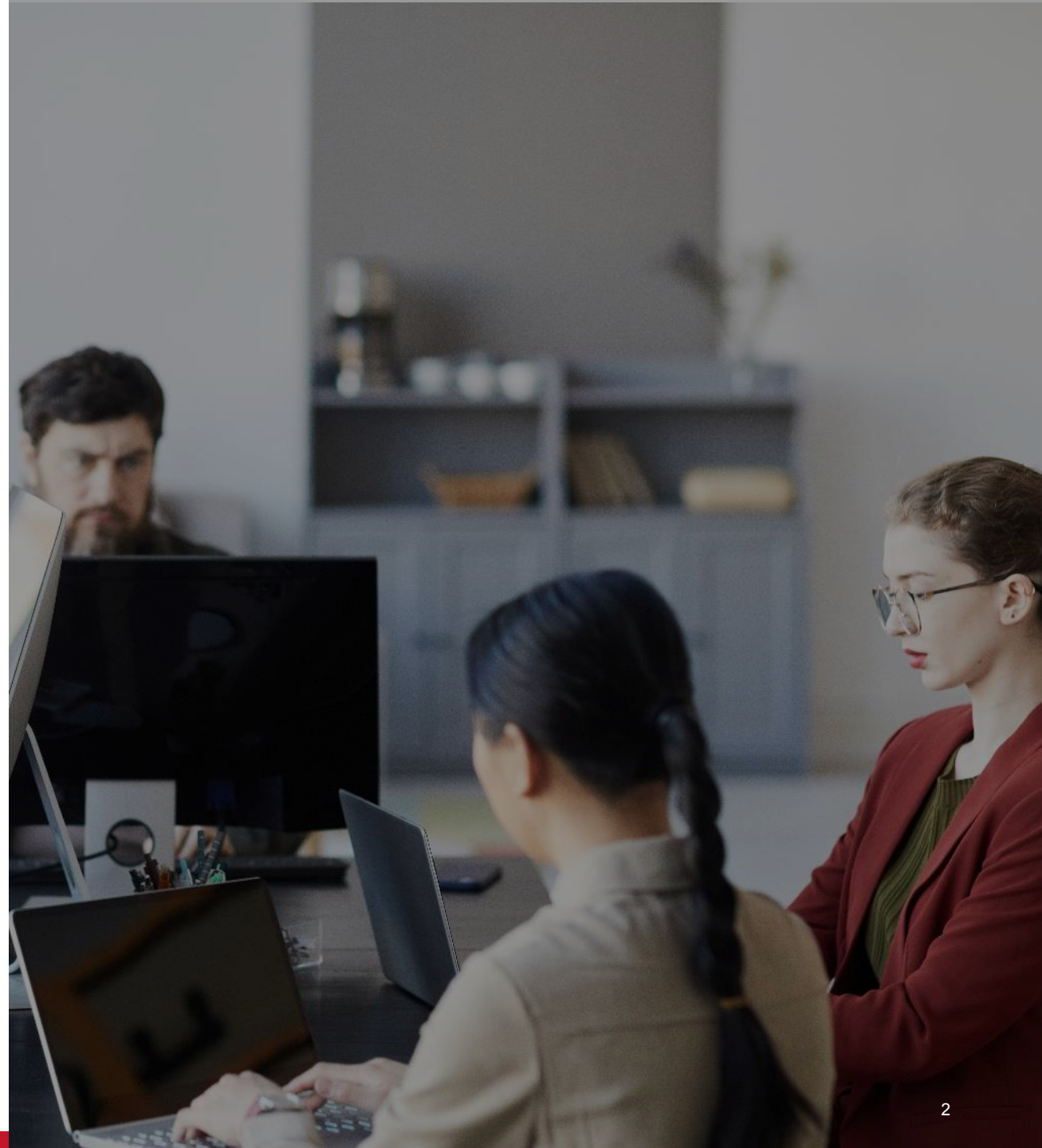
Driving Value Realization With Onboarding



Today

AGENDA

1. Intros
2. Why Customer Growth is Critical in 2025
3. Ways to Drive Value Realization Through Customer Onboarding
4. Take Aways



SOAR IS A CONSULTING & ENABLEMENT FIRM SPECIALIZING IN REVENUE GROWTH

- It's difficult to grow revenue faster than your industry's growth rate and faster than your competitors.
- SOAR's offerings align to the customer lifecycle and enable differentiated buyer and customer experience.

intel

pipedrive

VTS

hp

QGenda

Gainsight

Hewlett Packard
Enterprise

Seismic

Kobiton

vmware

Achieve3000

kevel

SAP

Recorded
Future

FULCRUM
EQUITY PARTNERS

paloalto
NETWORKS

MAMBU

automotiveMastermind

MARLIN EQUITY
PARTNERS

LiveAction

Stratasean



Why Customer Growth is Critical in 2025



Change in Buyer Behavior

60+ days longer cycles
Business case scrutiny



Economic Advantages of Expansion

5x lower cost
30% higher win rate



Massive Impact on NRR and LTV

NRR ceiling without expand
Customer that expand renew at 78% higher rate



NRR Drives Valuation

NRR has higher correlation with valuation than any other metric



Poll

NRR% FOR 2025

1. What was your NRR performance in 2024?
2. What is your NRR target in 2025?



Things You Can Do to Drive Value Realization Through Onboarding

1

Create a Clear
Value
Realization
Framework

2

Identify Your
Leading
Indicator of
Retention &
Expansion
(LIRE)

3

Make
Onboarding All
About Achieving
LIRE

4

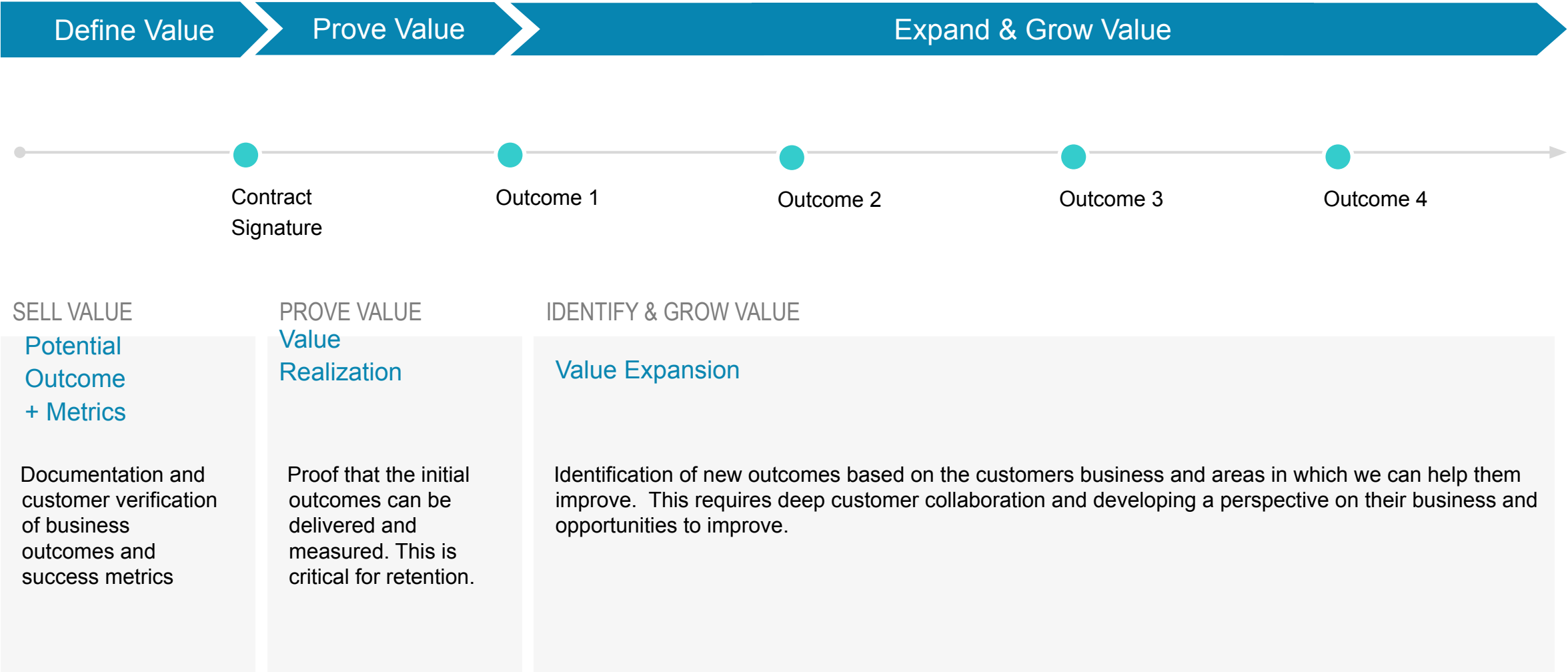
Balance
Technical
Onboarding and
the Onboarding
Experience

5

Automate
Routine Tasks to
Allow for More
Focus on
Relationship
Development



Create a Clear Value Realization Framework



Nail the Sales Handshake

Handoff Item	Detail
What did this customer buy?	
Why did they buy it?	
What value are they expecting to get?	
Who are the key players on the customer side?	
When are they expecting to realize value?	



Establish a LIRE

Leading Indicator of Retention & Expansion

=

A specific, measurable outcome that directly correlates with accounts that we retain + expand



Examples of LIRE



- 2,000 + messages in first 30 days



Examples of LIRE



- 5 out of 25 features utilized within 60 days



Examples of LIRE



- Minimum of 3 priority intelligence requirements identified by the end of onboarding



Examples of LIRE

LiveAction

- 75% of network devices monitored within 6 months



Examples of LIRE



- CMIO signoff on implementation



Align Technical Onboarding with the Onboarding Experience

Technical

Does the
solution work
as we
intended it?

Experience

Are we
excited about
partnering
with this
organization?



Things You Can Do to Drive Value Realization Through Onboarding

1

Create a Clear
Value
Realization
Framework

2

Nail the Sales
Handshake

3

Make
Onboarding All
About Achieving
LIRE

4

Balance
Technical
Onboarding and
the Onboarding
Experience

5

Automate
Routine Tasks to
Allow for More
Focus on
Relationship
Development



Q&A / Discussion

Call to Action

NEXT STEPS

1. Contact
 1. johnthackston@soarperformancegroup.com
2. Implement at least 1 idea from today to accelerate your customer growth!

