

Opportunity Inventory

Full, uncapped list of value creation opportunities identified by Benefits Sizer — before curation to the top 3–5.

Digital Strategy & Governance

Establish formal monthly digital governance forum with consolidated budget and benefits tracking [Quick Win]

- Lever: Multiple & Narrative Readiness | Effort: Low | Impact: High
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes CEO will commit to monthly cadence and documented decisions; current informal preference for weekly syncs suggests cultural resistance to formalization.

Build consolidated digital/technology initiative roadmap with stage gates, approval criteria, and assigned portfolio owners

- Lever: Multiple & Narrative Readiness | Effort: Medium | Impact: High
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes CEO and CFO align on portfolio governance model and acceptance of formal decision framework; current lesson from billing system stall (no owner assigned) indicates willingness but no follow-through.

Implement monthly digital benefits realization tracking against approved plan with accountability by initiative owner [Quick Win]

- Lever: Multiple & Narrative Readiness | Effort: Low | Impact: Medium
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes CFO leadership and willingness to enforce tracking discipline post-approval; fragmented spreadsheet tracking suggests data exists but is not consolidated.

Data Foundation

Remediate known data quality defects in orders table (currency, state field formatting) and assign ownership [Quick Win]

- Lever: Cost Reduction | Effort: Low | Impact: Medium
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes defects are well-scoped and documented from recent audit; assumes CTO or data team can prioritize remediation within 100-day window.

Implement master data management for core entities (customers, orders, products) with single source of truth and documented lineage

- Lever: Cost Reduction | Effort: High | Impact: High
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes manual rekeying is the largest operational drag (per COO); assumes existing data model ('reasonably solid' per CTO) can serve as foundation; assumes 3–6 month implementation horizon given infrastructure and process change required.

Deploy automated data quality monitors on top revenue-driving tables (orders, leads, contracts) with alerting

- Lever: Cost Reduction | Effort: Medium | Impact: Medium
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes monitoring infrastructure can be built on top of existing integrations; assumes known quality issues (currency, state formatting) are representative of broader data hygiene risk.

Build searchable data catalog with automated lineage documentation for core systems (NetSuite, Salesforce, billing)

- Lever: Scalability | Effort: Medium | Impact: Medium
- Confidence: Medium | Thesis: Primary
- Assumptions: Assumes multiple point-to-point integrations (Stripe, Twilio, Salesforce-to-NetSuite) create sufficient lineage complexity to justify catalog investment; assumes stalled lead-scoring PoC reflects ownership/documentation gap that catalog would mitigate.

Establish formal data governance forum with assigned MDM owner and monthly data quality review cadence [Quick Win]

- Lever: Cost Reduction | Effort: Low | Impact: Medium
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes CTO and CFO can dedicate monthly review time; assumes known issues (orders table, churn spreadsheet) represent governance rather than technical gaps.

Architecture

Replace point-to-point integrations (Stripe, Twilio, Salesforce-to-NetSuite) with standardized API/iPaaS layer [Deal-Breaker Link]

- Lever: Risk & Resilience | Effort: High | Impact: High
- Confidence: Medium | Thesis: Neutral
- Assumptions: Assumes point-to-point integrations are major source of operational fragility (per CTO on inconsistent patterns); assumes modernization deprioritization reflects resource constraint rather than technical disagreement; assumes 6–12 month implementation on 12-year monolith.

Implement infrastructure-as-code and automated CI/CD pipeline for 12-year-old Rails monolith [Deal-Breaker Link]

- Lever: Scalability | Effort: High | Impact: High
- Confidence: Medium | Thesis: Primary
- Assumptions: Assumes manual SSH deployments are directly constraining feature velocity and reliability (recurring outages during month-end runs); assumes engineering team has backend strength but lacks DevOps capacity; assumes 6–12 month engagement with external DevOps support likely required.

Establish tech debt register and prioritized burn-down plan with assigned engineering owner

- Lever: Multiple & Narrative Readiness | Effort: Medium | Impact: Medium
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes monolithic architecture and manual deployments represent substantial undocumented debt; assumes formal register would support investor narrative and prioritization discipline that currently lacks.

Application Portfolio Health

Rationalize and consolidate redundant/overlapping applications in supporting SaaS portfolio

- Lever: Cost Reduction | Effort: Low | Impact: Low
- Confidence: High | Thesis: Secondary
- Assumptions: COO has already reduced portfolio from 14 to 6 tools with quarterly license reviews in place; assumes further consolidation opportunity is limited and low-impact; includes this for completeness but not as priority.

Implement formal right-sizing and shelfware elimination program for licensing across core platforms (Salesforce, NetSuite)

- Lever: Cost Reduction | Effort: Low | Impact: Low
- Confidence: High | Thesis: Secondary
- Assumptions: Evidence shows quarterly license utilization reviews already in place; additional optimization likely marginal; included for completeness.

Process Automation

Automate customer onboarding workflow (CRM, billing, FSM provisioning) to eliminate 3-day manual rekeying cycle

- Lever: Cost Reduction | Effort: High | Impact: High
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes 3-day manual rekeying is accurately scoped and repeatable across new customers; assumes workflow orchestration capability can be added to monolithic platform or via iPaaS; assumes 6–9 month implementation horizon given current architecture state and DevOps capacity constraint.

Automate order-to-cash financial close workflow to eliminate 60% manual contract re-entry and reduce 9-day close cycle

- Lever: Cost Reduction | Effort: High | Impact: High
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes 60% manual re-entry and 9-day close cycle are well-documented operational constraints; assumes CFO can specify automation requirements; assumes integration across Salesforce, NetSuite, and billing system required; assumes 6–12 month implementation horizon given complexity.

Build formal process maps and automation backlog for top 10 opportunities; establish automation governance and prioritization framework

- Lever: Multiple & Narrative Readiness | Effort: Medium | Impact: Medium
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes COO has identified ~12 opportunities but lacks formal scoping or prioritization; assumes business cases and effort estimates will support investment decisions and investor-facing narrative.

Implement support ticket routing automation with SLA-driven triage rules to replace manual sorting

- Lever: Cost Reduction | Effort: Medium | Impact: Low
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes 6-person support team manually triages tickets with no tooling; assumes impact is contained to operational efficiency within a single function rather than business-wide; assumes medium effort due to workflow configuration and training required.

Analytics & AI

Operationalize lead-scoring model stalled at PoC with assigned ownership, monitoring infrastructure, and integration to CRM

- Lever: Revenue Growth | Effort: Medium | Impact: Medium
- Confidence: Low | Thesis: Neutral
- Assumptions: Assumes PoC model is salvageable and business case is compelling; assumes lack of ownership and monitoring was the stall reason (not model performance); assumes CMO_CRO and CTO can dedicate resourcing post-100-day window; actual revenue impact uncertain without model performance data.

Deploy operational dashboards for top 3 decision drivers (sales pipeline, churn risk, margin by customer segment) in regular use [Quick Win]

- Lever: Revenue Growth | Effort: Low | Impact: Medium
- Confidence: Medium | Thesis: Neutral
- Assumptions: Assumes Salesforce dashboards exist but lack granular attribution and are not actively used for decisions (CMO_CRO: 'good enough for forecasting' but missing

channel detail)); assumes dashboard build can leverage existing data and configuration; assumes adoption and habit-change will drive impact.

Implement churn prediction model and at-risk account alerting integrated to CRM workflow

- Lever: Revenue Growth | Effort: Medium | Impact: High
- Confidence: Low | Thesis: Neutral
- Assumptions: Assumes churn drivers can be extracted from manual CS team cross-checks and formalized into predictive features; assumes model would directly support retention strategy and identify at-risk cohorts; assumes lack of systematic churn tracking (spreadsheet-based) means model is currently infeasible but high-value if data gaps are closed.

Build multi-touch campaign attribution model and implement A/B testing framework for marketing spend optimization

- Lever: Revenue Growth | Effort: High | Impact: Medium
- Confidence: Low | Thesis: Neutral
- Assumptions: Assumes CMO_CRO budget allocation decisions currently rely on instinct rather than data, but model accuracy and adoption risk are high; assumes fragmented lead re-entry (HubSpot → Salesforce → NetSuite) introduces data quality risk that must be resolved first; assumes 6–9 month horizon including data cleanup and model validation.

Security & Resilience

Test live DR failover and remediate known database failover runbook gaps; document RTO/RPO for all critical systems [Deal-Breaker Link]

- Lever: Risk & Resilience | Effort: Medium | Impact: High
- Confidence: Low | Thesis: Neutral
- Assumptions: Assumes tabletop exercise RTO/RPO (4h/24h) are realistic targets for live failover; assumes database runbook gap is scoped and remediable; assumes CTO can orchestrate live test without unacceptable downtime risk; confidence is Low due to sparse evidence on current failover capability and infrastructure readiness.

Enforce multi-factor authentication (MFA) across all 6 critical systems and eliminate password-only access [Quick Win] [Deal-Breaker Link]

- Lever: Risk & Resilience | Effort: Low | Impact: High
- Confidence: Low | Thesis: Neutral
- Assumptions: Assumes MFA is technically feasible on systems currently lacking it (3 of 6 have MFA, 3 do not); assumes rollout effort is primarily user enablement and policy enforcement rather than infrastructure; confidence is Low due to incomplete visibility on actual system compliance and technical constraints.

Establish formal critical vulnerability patching SLA with defined cadence and monthly executive reporting [Quick Win] [Deal-Breaker Link]

- Lever: Risk & Resilience | Effort: Low | Impact: Medium
- Confidence: Low | Thesis: Neutral
- Assumptions: Assumes 2–3 week informal critical patch cycle can be formalized into an SLA without undue operational burden; assumes CTO or external security consultant can define and enforce cadence; confidence is Low due to sparse evidence on actual current patch capability and risk exposure window.

Conduct current penetration test and document remediation roadmap for identified findings

- Lever: Risk & Resilience | Effort: Medium | Impact: Medium
- Confidence: Low | Thesis: Neutral
- Assumptions: Assumes previous pen-test (couple years old) is stale and findings are unknown; assumes current test will surface material risks that should be tracked and remediated; confidence is Low due to absence of artifact trail and inability to assess current exposure from prior findings.

People & Change

Hire or develop dedicated in-house security function; transition from part-time external consultant to lead security ownership [Deal-Breaker Link]

- Lever: Risk & Resilience | Effort: High | Impact: High
- Confidence: Medium | Thesis: Neutral
- Assumptions: Assumes current reliance on part-time consultant is unsustainable at scale and post-acquisition; assumes market for security talent will support hire; assumes 2–3 month recruitment horizon plus 6-month ramp to productivity.

Hire or develop DevOps/SRE capability in-house; establish infrastructure and deployment discipline as core engineering function [Deal-Breaker Link]

- Lever: Scalability | Effort: High | Impact: High
- Confidence: Medium | Thesis: Primary
- Assumptions: Assumes engineering team is thin on DevOps/SRE and infrastructure modernization has been deprioritized due to capacity; assumes dedicated hire or external augmentation is required to unblock CI/CD and IaC implementation; assumes 2–3 month recruitment plus 3–6 month knowledge transfer and delivery.

Build formal skills matrix and structured learning paths for digital capability across operations, analytics, and security

- Lever: Scalability | Effort: Medium | Impact: Medium
- Confidence: Medium | Thesis: Primary
- Assumptions: Assumes Director of RevOps hire and COO's structured onboarding program signal readiness to formalize capability development; assumes business case exists for data and security skills given identified gaps; assumes 3–4 month design and rollout horizon.

Implement structured change management framework and governance process for major digital releases post-100-day

- Lever: Multiple & Narrative Readiness | Effort: Medium | Impact: Medium
- Confidence: Medium | Thesis: Secondary
- Assumptions: Assumes COO has established informal change management (release notes, training, office hours) that can be formalized into a governance process; assumes framework will support investor narrative on disciplined digital delivery and adoption risk mitigation.