



\$122M BOARD TARGET. \$108M TO \$112M SUPPORTABLE RANGE.

Composite case · PE-backed SaaS · No client confidential data

Overall grade:

Board-Risky

5 business days

PE-backed SaaS · \$122M ARR board target · Board plan in 21 days

Materials: Excel model, board deck, pipeline export, org plan — no systems access

Board target: \$122M ARR

Supportable range: \$108M – \$112M
Overlap-adjusted. Gross breaks are not additive.

Pipeline coverage

- 1 Board deck shows 3.2x coverage; supportable against implied bookings target is 1.8x. Late-stage deals carry win rates that have not been revalidated post-ICP shift.

\$9.2M

gross break

Sales capacity

- 2 Revenue ramp implies 142% sales-capacity utilization by Q4. Current run-rate is 78%. No headcount plan closes the gap inside the planning period.

\$6.7M

gross break

Onboarding throughput

- 3 Plan assumes 34 go-lives per quarter. Current implementation capacity supports 22 without added headcount or partner bandwidth. Recognized ARR is capped.

\$4.3M

gross break

NRR assumption

- 4 Model assumes 128% NRR. Recent realized range is 109% to 113%. Expansion assumes account coverage and customer health data have not been validated.

\$3.2M

gross break

Scenario design — Upside and downside cases change revenue totals but do not change hiring, timing, or capital actions.

Traceability — 6 of 14 board metrics do not tie cleanly to source-model rows. Ownership — 4 of 11 material assumptions have no named executive owner.

Diagnostic confirms risk → Blueprint designs the rebuild path → Strategic Forecast Build creates the board-ready model