
J-Neely Consulting: 90-Day Productized Engagement Plan for SaaS Companies

Product Name: SaaS Transformation Accelerator

Role: Fractional Strategy Consultant / Director of Operations

Target Clients: Early- to mid-stage SaaS companies (\$5M–\$50M ARR) seeking scalable systems, improved onboarding, and operational clarity.

Summary:

Each engagement is customized to the client's unique needs and maturity level—but here's what you can expect over a 90-day period as part of the SaaS Transformation Accelerator. This proven framework brings clarity, alignment, and operational lift without disrupting momentum.

Phase 1: Discover & Diagnose (Days 1–30)

Objective: Understand the current state, align stakeholders, and identify quick wins.

Key Activities:

- Executive alignment interviews (Founder, CRO, Head of CS, Product, etc.)
- End-to-end review of onboarding, client handoffs, delivery lifecycle, and support flows
- Data analysis: Time-to-Value (TTV), churn, NPS, retention, client sentiment
- Internal 5S audit (Staff, Systems, Strategy, Structure, Scalability)
- Shadowing of key meetings (Sales > CS > Delivery)

Deliverables:

- Current-state diagnostic deck
- Priority Risk & Opportunity Matrix
- Quick wins + pilot candidates identified

Phase 2: Design & Drive (Days 31–60)

Objective: Implement foundational improvements, align teams, and demonstrate impact.

Key Activities:

- Redesign onboarding/implementation model (phases, SLAs, roles, outcomes)
- Build process playbooks and kickoff templates
- Launch simple dashboards to track TTV, CSAT, onboarding cycle time
- Facilitate 2–3 alignment workshops across departments
- Introduce light-weight OKRs or sprint cadences

Deliverables:

- MVP delivery framework deployed to pilot clients
- Team enablement materials (internal playbooks, SOPs)
- Working metrics dashboard with real-time visibility
- Alignment cadence map (cross-functional communication structure)

Phase 3: Deliver & Scale (Days 61–90)

Objective: Measure progress, lock in improvements, and build for long-term scale.

Key Activities:

- Finalize and document improved delivery model
- Embed training + QA for long-term enablement
- Establish internal KPI review cycles and reporting cadences
- Handoff coaching to future owners (Head of CS, Ops Lead)
- Strategic brief delivered to leadership for next-phase roadmap

Deliverables:

- Final impact report with before/after metrics
- Strategic SaaS Ops Roadmap (6–12 month view)
- Retention/expansion-ready delivery playbook
- Exit brief and transition checklist

Tagline:

Executing Systems. Driving Profitability.

Add-On Options:

- PMO-as-a-Service (Monthly)
- Implementation Health Audit (One-time)
- Founder Advisory Retainer (3-month minimum)