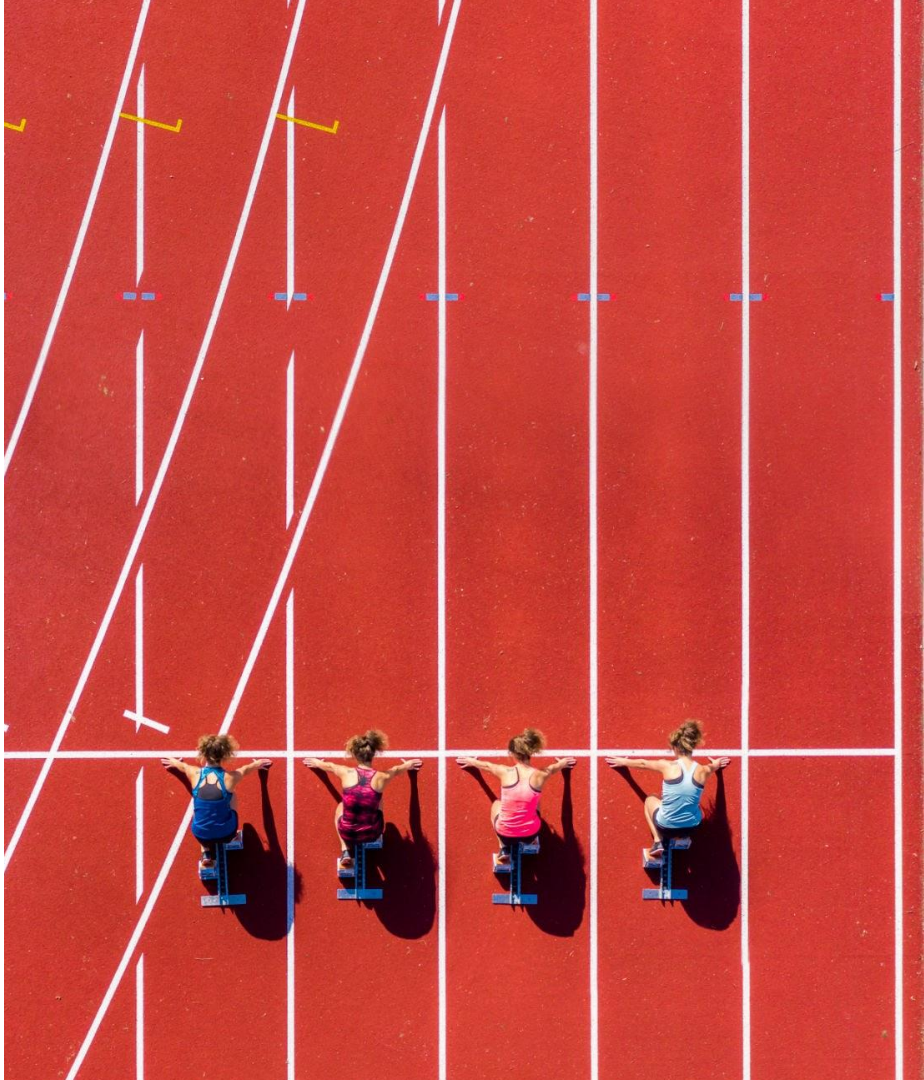
Driving Growth for the Practitioner Lifecycle

B2B SaaS Consulting Project



Agenda

Executive Summary

Practitioner growth is constrained by **lifecycle execution gaps**, not demand. Missed activation, incomplete adoption, and under-monetized power users are limiting revenue and retention.

There are three core opportunities:

- **Activation**: Drop-off between trial start and paid conversion
- **Product Adoption**: Limited feature usage reduces retention and downstream value
- **Upsell**: High-intent practitioners reach plan limits without timely expansion

While product adoption has the largest long-term upside, it requires sustained effort. **Upsell offers the fastest near-term impact** with lower lift and clear in-product signals.

This engagement focuses on driving **quick wins through upsell**, while laying the groundwork for stronger adoption.

Recommendation

Now (0–90 days):

- Activate upsell using high-intent signals (usage limits, advanced features, team growth)
- Launch low-effort lifecycle campaigns to capture near-term revenue

Next:

- Use upsell insights to improve product education and adoption

Later:

- Strengthen activation to compound lifecycle gains

Why this approach works:

- Lowest execution effort
- Signals already exist in-product
- Revenue impact in weeks, not quarters
- Adoption improvements benefit all lifecycle stages

Opportunity Comparison

Identify quick wins

Biggest opportunity is in product adoption, however this is high-effort, high-upside.

Adoption affects all downstream use, medium effort to educate users.

⭐Upsell is the lowest effort but medium pay-off - best for short-term implementation for quick wins.

Opportunity Analysis

To calculate with customer CRM data

Activation

Sizing

- Lost activation opp: # trials started - # free-to-paid conversion / # trials started
- Est. lost revenue: (trial users - paid users) * ARPU

Benchmarks

Userpilot: avg. user activation rate for healthcare = 23.8%

Product Adoption

Sizing

- Trial non-conversion rate
- Est. lost revenue:
  - MRR churn
  - MRR contraction
  - cLTV
  - replacement CAC

Benchmarks

Userpilot: 22..8% healthcare product adoption rate

Upsell

Sizing

Segment eligible for upsell: hitting usage limit/missing key features offered in higher tier

Benchmarks

Monetizely: 15-25% for growth stage SaaS

Behavioural Signals

How to detect risk and opportunity in-product

📉 Churn

- **Fewer logins and interactions**
- **Drop in billing, payments, or new clients**
- Fewer tasks or reminders created
- Removed key integrations
- Slower onboarding or setup completion
- Using fewer features/modules over time

📈 Upsell

- **Frequent logins**
- **Hitting plan limits**
- Adding practitioners
- Creating courses or content
- Adding new integrations
- Consistent use of advanced features
- More active seats than purchased

Practitioner Focus

Personalized messaging and triggers by segment

01

NEW PRACTITIONER

Messaging
Time savings, compliance, smoother ops

Triggers

- Adding new practitioners
- ~10 clients onboarded
- Interest in higher-tier features (group classes, recurring payments)

02

SOLO PRACTITIONER

Messaging
Efficiency, automation, new revenue streams

Triggers

- ~300 clients onboarded
- Hitting plan/credit limits
- Interest in advanced features (broadcast messaging, fax)

03

GROUP PRACTICE

Messaging
Collaboration, scalability, all-in-one workflows

Triggers

- Show multi-user needs
- Team require role-based permissions/admin oversight
- Hitting plan/credit limits (SMS, documents, broadcast messaging)

Customer Journey - Upsell

	01	02	03	04
	Week 1	**Week 2**	**Week 3**	**Week 4**
	Email + in-app banner	Webinar + in-app banner	Case study/ feature deep dive	Email (testimonial)
A/B Testing	Creative: percentage use number versus visual progress bar OR channel mix (email + banner)	Messaging: generic benefits or personalized for practitioner/product use	Creative: text only or designed layout	Messaging: generic testimonial or personalized for practitioner/product use

90 Day Planning

	Scope & Requirements	Outcomes & Derisk
DAYS 1-30	Lifecycle map, KPI baseline, gap hypotheses, quick wins **Needs**: CRM + product data, aligned lifecycle/milestone definitions	Clear program view, benchmarks, focus areas, early wins **Derisk**: Use proxy metrics; align definitions early
DAYS 31-60	Campaign setup, triggers, top-3 tests **Needs**: Marketing automation access, cross-functional support	Higher engagement and activation **Derisk**: Launch MVPs first to gather early data
DAYS 61-90	Performance dashboard, iteration roadmap **Needs**: Reporting tools, CS feedback loop	Metric lift on winning tests, scalable plan **Derisk**: Extend test windows for low volume; validate with cohorts