E-book

Scale your startup: 5 steps to go from early to growth stage

Transitioning from early to growth stage is where many startups stumble. From increasing revenue to proving your model, learn how to scale efficiently and show investors that your business has what it takes to go the distance.

Read this e-book for actionable advice on navigating the crucial growth transition, so you can prove your revenue model, optimise recurring revenue, and position your company for the next round of funding—all the way through to IPO.

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This e-book will help you to:

- Prove your revenue model works
- Optimise recurring revenue streams
- Build scalable systems and processes
- Track the right metrics to tell your growth story
- Forecast effectively to position for your next funding round—or even IPO

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Table of contents

Insights from Stephen Millard, operating partner at Notion	**Page 4**
Early and growth stage goals: A brief overview	**Page 5**
5 steps to achieve your growth stage goals	**Page 6**
Step 1: Integrate systems for quote-to-cash	**Page 7**
Step 2: Establish flexible, contract-based billing	**Page 8**
Step 3: Build end-to-end revenue management	**Page 9**
Step 4: Create real-time SaaS Dashboards	**Page 10**
Step 5: Forecast and plan the future	**Page 11**
How Sage Intacct is uniquely qualified to help you reach the next stage	**Page 13**
We're committed to your success	**Page 15**

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Insights from Stephen Millard, operating partner at Notion

To bring you expert insights, we've partnered with Stephen Millard, operating partner at Notion, one of Europe's leading venture capital firms specialising in SaaS.

Stephen has extensive experience working with high-growth software companies across the UK and Europe. At Notion, he helps founders navigate the financial and operational challenges of scaling, with a particular focus on metrics that matter to investors.

Drawing from his own entrepreneurial journey—including scaling MessageLabs to £150 million in revenue before its acquisition by Symantec—Stephen offers practical advice grounded in real-world success.

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Early and growth stage goals:
A brief overview

As your startup evolves, your financial goals and focus areas shift. Understanding and anticipating these changes is crucial for navigating your company's growth trajectory successfully. Here's a big-picture look at how your goals are likely to shift:

Early stage goals:

- ✓ Build a repeatable, efficient sales process
- ✓ Establish promising initial unit economics
- ✓ Ensure solid, compliant financials

Growth stage goals:

- ✓ Manage Customer Lifetime Value (CLTV)
- ✓ Show capital efficiency
- ✓ Define and track gross and net churn

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5 steps to achieve your growth stage goals

Transitioning from proving your product-market fit to proving your recurring revenue model will be the biggest growth-stage effort. As you work towards it, these five steps will help you streamline operations, gain competitive advantage, and drive growth.

1 **Integrate systems for quote-to-cash**

Track CLTV in one contract between Customer Relationship Management (CRM) and financial management system.

2 **Establish flexible, contract-based billing**

Create value with expanded offerings and value-based pricing.

3 **Build end-to-end revenue management**

Gain visibility into deferred revenue to guide valuation.

4 **Create real-time SaaS dashboards**

Align to one source of truth and metrics.

5 **Forecast and plan the future**

Accelerate decisions with visibility into billings, cash, and revenue.

Let’s explore each step in detail.

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1
Integrate systems for quote-to-cash

As you scale sales to prove your revenue model, it's crucial to remove friction points from the sales process and maintain a single version of the truth. Natively connecting your CRM and your Configure, Price, Quote (CPQ) process to your financials provides several benefits:

- Streamlines initial sales, renewals, and add-on business.
- Provides common metrics on CLTV, Customer Acquisition Cost (CAC), and churn for both sales and finance.
- Removes billing obstacles, bringing cash into the business sooner.

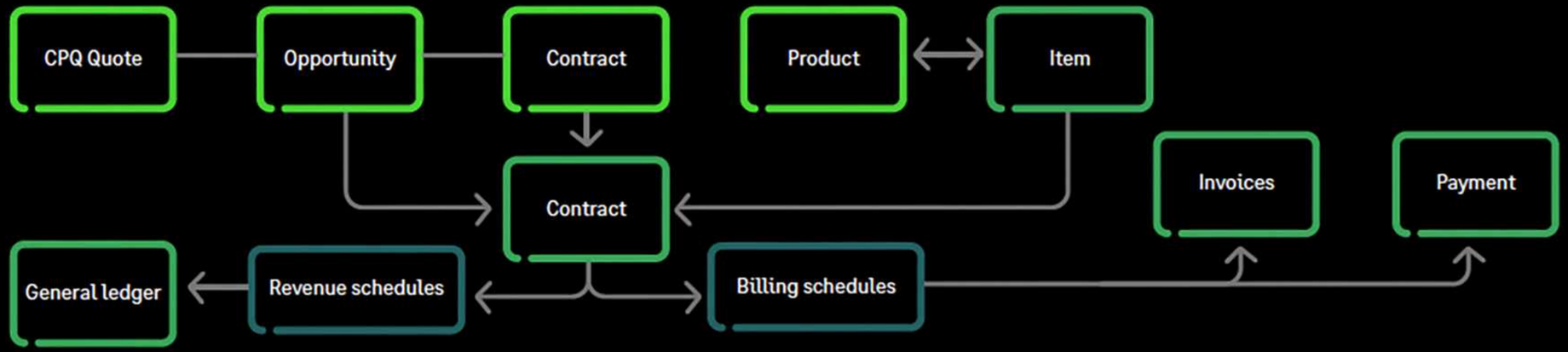
Stephen's advice: a strong quote-to-cash process, supported by connected CRM, billing, and finance tools, lets you understand every aspect of your business—from how you win customers to how they impact your financials. Integration eliminates inefficiencies, improves decision-making, and sets the foundation for scalable growth.

HubSpot

salesforce

Salesforce/HubSpot

Financials



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2

Establish flexible, contract-based billing

As you grow, you may need to expand your offerings to attract new customers, increase your average sales price, and retain existing customers. The ability to handle different types of revenue streams and billing provides more flexibility to innovate and maximise CLTV.

Consider supporting these billing models:

Perpetual:	• License • Maintenance • Support	
SaaS:	• Subscription	
Usage:	• Usage pricing • Tiered pricing • Price per thousand • Minimum flat fees	• Included units • Overages • Customer specific
Services:	• Hours • Time and materials • Fixed price	

Stephen's advice: having a billing solution that scales with your business—supporting a mix of models like subscription, usage-based, or hybrid—is crucial. As you grow, these flexible systems allow you to meet diverse customer needs while maintaining operational simplicity. By integrating billing with your broader financial systems, you can improve efficiency and gain clearer insights into your revenue streams.

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3

Build end-to-end revenue management

As your revenue grows, financial audits become crucial for credibility. Your financials need to be IFRS 15 compliant. A solution designed for recurring revenue rather than individually placed orders will:

- Automate compliance, especially revenue recognition and expense amortisation.
- Save time and decrease the risk of errors.
- Gain visibility into unbilled, billed, and paid revenues.

	Unbilled	Billed	Paid	Total
Deferred Revenue	£9,000	£2,000	£0	£11,000
Sales Revenue	**£0**	**£1,000**	**£0**	**£1,000**
Total	£9,000	£3,000	£0	£12,000

Stephen's advice: by the time your business is scaling, having a single source of truth for revenue data—supported by automated, integrated systems—is essential. It allows you to track how you win customers, make them successful, and measure their financial impact with confidence.

To ensure compliance and streamline operations, it's equally important to invest in a high-quality finance team and robust financial software.

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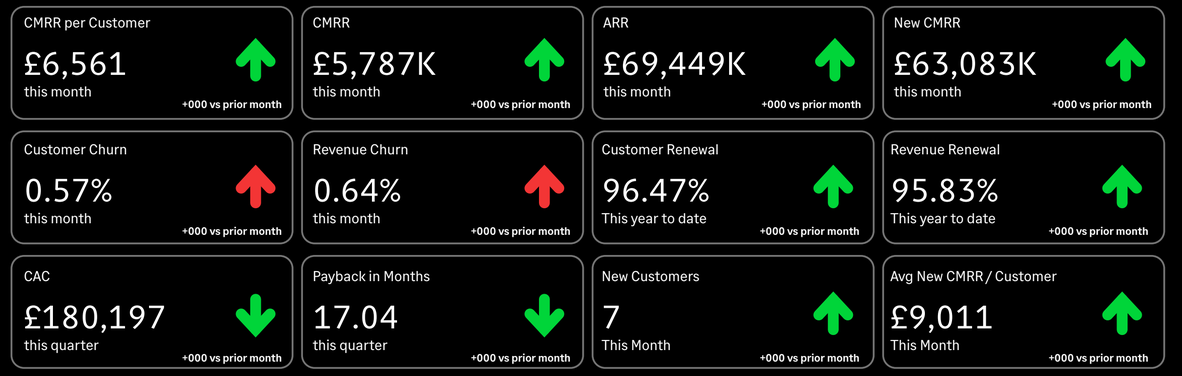
4

Create real-time SaaS dashboards

Understanding both compliance and SaaS metrics is critical to your business. Compliance metrics show where you've been and where you are now, while SaaS metrics indicate where the business is going. Connecting your contractual obligations to billing, revenue management, and the general ledger can automate the creation of these metrics, providing:

- Real-time insights and new tools that empower and delight both your finance team and business users to do their best work.
- Make faster, smarter decisions and outsmart the competition.
- A holistic view of your compliance and SaaS performance.



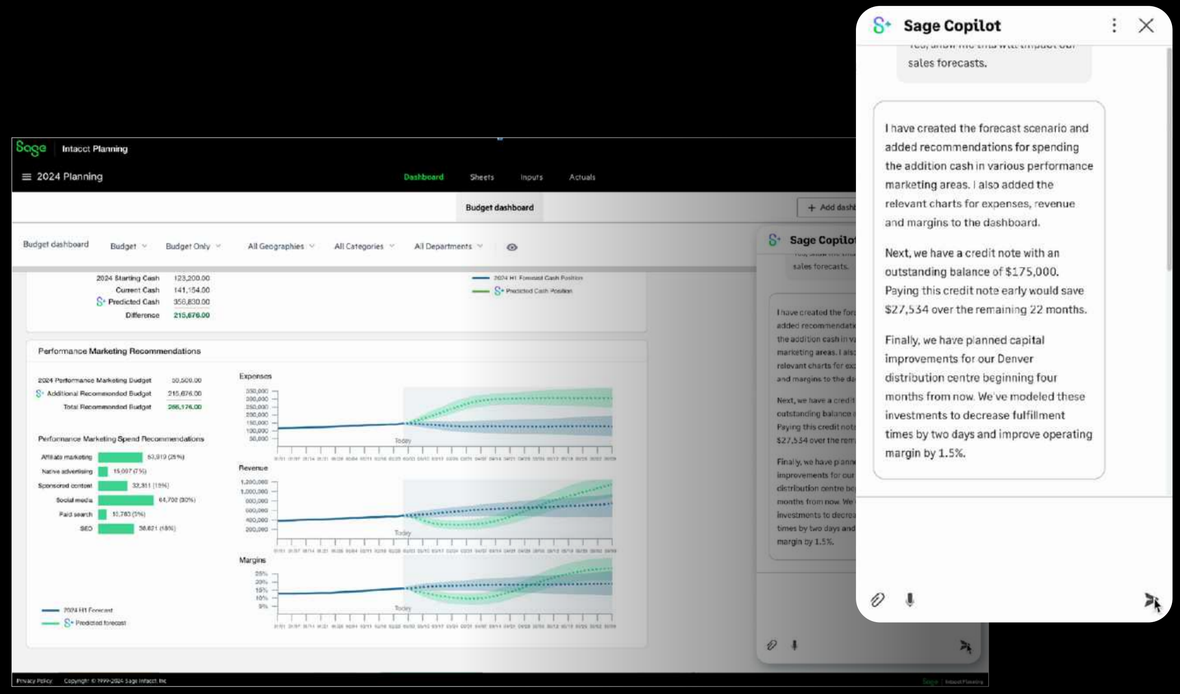
Stephen's advice: dashboards should evolve as your business scales, providing clear and actionable insights across key dimensions like products, regions, and customer segments. A robust reporting system that supports unlimited dimensions ensures you can drill down into the metrics that matter most, helping you make smarter, data-driven decisions at every stage of growth.

5

Forecast and plan the future

Ensure that earnings, outlook, and financial statements tell the same story. Compare your performance against budgets and close scenarios and confidently forecast with AI-enabled tools, helping you to make the right decisions to secure your funding ambitions.

- Integrate all your business tech together for a unified quote to forecast process.
- Automatically generate forecasts.
- Get a single view of your customers across billing, revenue recognition, and cash.
- Shift from manually reporting the past to real-time forecasting for the future.



Stephen's advice: accurate forecasting comes from combining robust subscription revenue management with clear, actionable data. By investing in systems that integrate forecasting with subscription metrics, you can plan more efficiently, align resources with growth opportunities, and anticipate challenges before they arise. This level of precision is critical for scaling your business with confidence.

By implementing these five steps, you'll be well-positioned to prove your recurring revenue model and drive your company's growth to the next stage.

5 STEPS TO GO FROM EARLY TO GROWTH STAGE

Sage really took the time to understand our processes and how we do things. I was also really impressed at the way we could customise things and was never left feeling like we would have to spend time adapting to how Intacct worked. It was the other way around.

Jess Howe, Finance Manager
Featurespace

ROI achieved in less than 6 months

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How Sage Intacct is uniquely qualified to help you reach the next stage

Sage Intacct is a proven and validated solution used by customers across each of the five steps to help their businesses grow.

- **Integrate systems for unified quote to forecast**
- **Establish flexible, contract-based billing**
- **Build end-to-end revenue management**
- **Create real-time compliance and SaaS dashboards**
- **Intuitive budgeting and forecasting**

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Sage Intacct is the only solution that:

- Offers native quote-to-cash integration with Salesforce CPQ, covered by our Sage Intacct Buy with Confidence guarantee.
- Provides unlimited reporting dimensions for in-depth analysis.
- Supports recurring billing across perpetual, usage, recurring, and professional services models.
- Delivers prebuilt, customisable compliance and SaaS metrics dashboards.

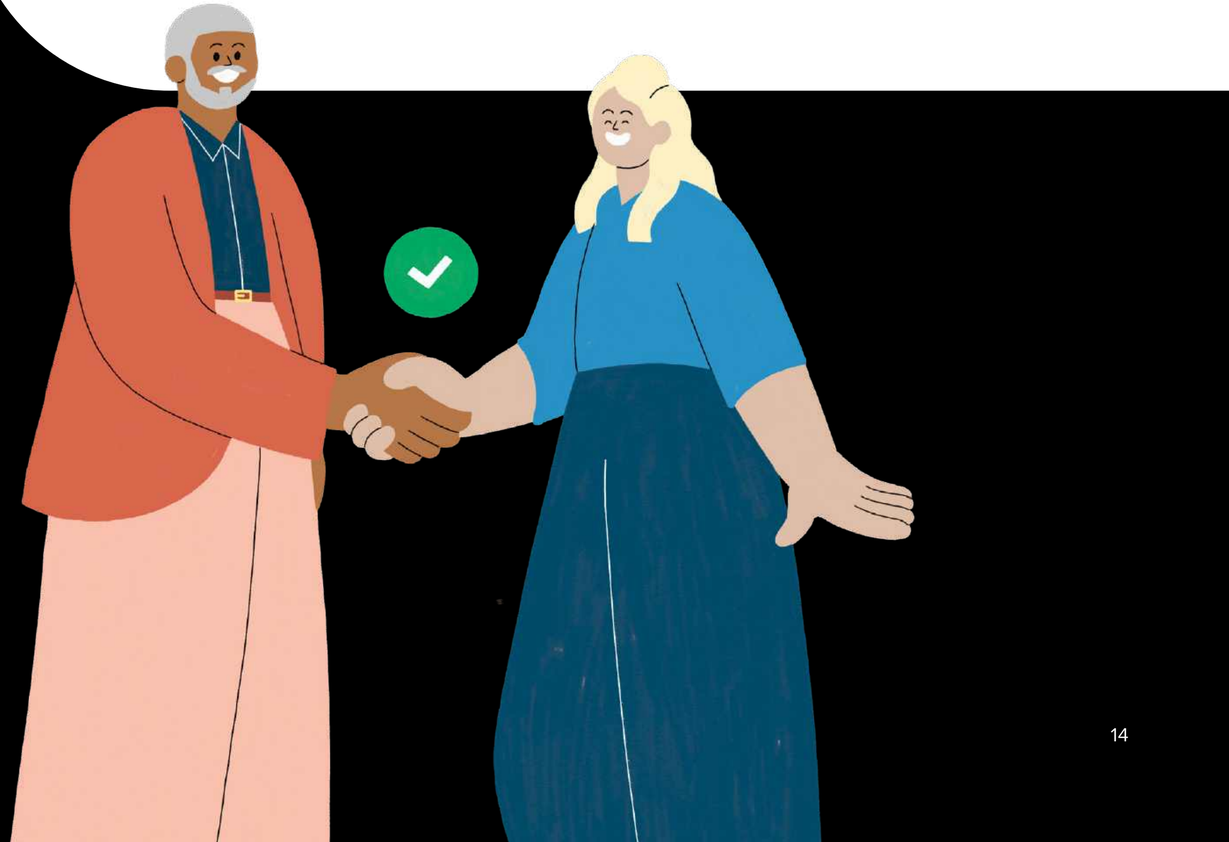
Sage Intacct is ranked #1 in:

TrustRadius Top Rated 2024

Customer Satisfaction in Accounting and ERP.

Subscription Revenue Management.

Source: Spring 2024 G2 Grid Report for Mid-Market Accounting Software.



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We’re committed to your success

You’ve seen how Sage Intacct can empower your SaaS company to reach new heights. Now, it’s time to experience the difference for yourself. By partnering with Sage Intacct, you can:

- ✓ Accelerate your quote-to-cash process and bring in revenue faster.
- ✓ Gain real-time visibility into your key SaaS metrics for more informed decision-making.
- ✓ Streamline your financial operations, freeing up time for strategic initiatives.
- ✓ Impress investors with accurate, compliant financial reporting and forecasting.
- ✓ Scale your business efficiently without adding unnecessary overhead.

Take the first step towards faster growth, easier funding, and smoother operations today.

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