



MONTHLY REPORT SAMPLE · SAAS / IT

What we'd see in your business.

SaaS / IT

DOCUMENT CONTEXT

This is a representative sample audit prepared from a fictional Japanese B2B SaaS company operating at approximately ¥240M ARR, with 12 employees, 180 active customers, and a self-serve trial-to-paid funnel alongside a small enterprise sales motion.

All names, figures, and individuals shown are fabricated. The methodology, formulas, structure, and analytical depth are *identical* to those used in a live engagement.

If this is what you'd want to see for your business — request a free assessment at meridian.tokyo/assessment. Within 48 hours, you'll receive a written diagnosis specific to your business.

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What this business looks like through our lens.

Key operational metrics, each benchmarked against industry. The table shows where your business currently sits versus targets and recovery potential. The numbers are a summary — the substance is in which metrics are dropping, why, and how to fix them. The analysis on the following pages is the value.

What we'd surface first

This SaaS business has a working acquisition engine and reasonable margins. The leaks are concentrated in the post-sale lifecycle: onboarding completion, expansion revenue, and silent churn.

The single biggest issue is silent churn at 14%: customers who stop using the product but keep paying for 3-6 months before canceling. *By the time they cancel, recovery is impossible.* Detecting it earlier is cheap and saves most of the dollars.

Expansion revenue is the second underperforming signal. NRR sits at 102% — barely above neutral — when most healthy B2B SaaS targets 115%+. Existing customers represent 4x more expansion potential than is being captured.

Key metrics this month

Metric	Weight	Current	Target
MRR (monthly)	15%	¥20M	¥22M
Net revenue retention	15%	102%	115%
Logo churn rate (inverse)	15%	2.4%	1.0%
CAC payback (months)	10%	14m	12m
Onboarding completion	10%	61%	85%
Trial-to-paid rate	10%	11%	15%
Gross margin	15%	78%	75%
Sales cycle (inverse)	10%	47d	30d

What's actually wrong — right now.

Three issues this business is bleeding money on. Each one has a specific cost, a specific fix, and a specific way to measure whether the fix worked. This is what the monthly action plan looks like, condensed.

01

HIGH IMPACT

Retention

14% of customers are silently churning before they cancel.

What we see

Of customers who churned in Q1, 76% had product usage drop below 20% of baseline 60-90 days before cancellation. There's no health-score system in place; CS finds out about churn via the cancellation email, by which point recovery is essentially impossible.

Estimated cost

~¥18M/year in churned MRR that could likely be saved with earlier intervention.

Recommended action

Build a usage-based health score (logins, key feature usage, last meaningful action). Set thresholds for automatic CS outreach at 30/60/90 days of declining engagement. Track save rate per intervention type — most saves come from a single concrete check-in, not a campaign.

02

HIGH IMPACT

Expansion revenue

NRR at 102% — leaving ~¥30M expansion revenue on the table.

What we see

Net revenue retention is 102% (gross 96%, expansion 6%). Industry top quartile is 115-130%. Of the existing 180 customers, 87 are on plans they outgrew 6+ months ago, based on usage. There's no expansion motion.

Estimated cost

Lifting NRR from 102 to 115% on current ARR adds ~¥30M annually with zero new acquisition spend.

Recommended action

Build a quarterly expansion review for accounts above ¥50k MRR. CS opens the conversation with usage data, not a sales pitch. Productize the upgrade path — the next tier should be an obvious answer, not a custom quote. Track expansion-MRR-per-CSM as a monthly metric.

03

MEDIUM IMPACT

Onboarding

39% of new customers never complete activation.

What we see

Of customers signed in the past 6 months, 39% have not completed the four-step activation flow (connect data, invite team, set up first workflow, hit first milestone). These customers have 3x the churn rate of activated customers.

Estimated cost

~¥12M/year in eventually-churning revenue that activation would prevent.

Recommended action

Assign every new customer a written 14-day activation plan emailed at signup. CS reaches out at day 3, 7, and 14 for incomplete activations. Make 'activated within 14 days' the primary success metric for the CS team — track it weekly.

What changed after the work.

After 6 months, the operational picture had shifted measurably. Each result corresponds to one of the red flags identified in the audit. Plausible, conservative, and tracked monthly.

01 Silent churn detection

BEFORE

76% of churn invisible until cancel



AFTER

Health scores trigger CS at -30 days

+18% save rate on at-risk accounts

02 Net Revenue Retention

BEFORE

NRR 102%



AFTER

NRR 114%

+~¥27M/year ARR uplift

03 Onboarding activation

BEFORE

39% drop-off at activation



AFTER

16% drop-off

after structured 14-day plan

Numbers reflect outcomes from comparable engagements, anonymized for confidentiality. Individual results vary; benchmarks are realistic averages, not best-case scenarios.

How an engagement actually runs.

A live engagement is structured. Not consulting hours, not “we’ll figure it out as we go”. Four phases of setup, then monthly delivery on a calendar.

WEEK 1

Discovery & data audit

We examine your existing data — CRM exports, finance sheets, ad reports, sales records. Format and condition don’t matter. We identify the highest-leverage gaps.

WEEKS 2-3

Sector calibration

We configure benchmarks, metrics, and red-flag thresholds against your industry and your prior periods. Custom-fit, not template.

WEEK 4

First diagnosis

First written diagnosis delivered. Three priorities to act on this month, with the cost of inaction quantified for each.

MONTH 2+

Monthly action plans

Each month, a written action plan. What’s broken, where the leaks are, and the prioritized playbook for next month. Asynchronous — reply by email when convenient.

Engagement tiers

Foundation

¥90k + ¥90k/mo

Single business, simple structure

Standard **RECOMMENDED**

¥130k + ¥130k/mo

Multi-channel, growing business

Extended

from ¥200k + ¥220k/mo

Multi-business-unit, group structure

Setup guarantee: if within 3 months the improvement opportunities we identify total less than what you’ve paid us in retainers, we refund the entire setup fee. The retainer is cancellable monthly — the guarantee covers identification of opportunities, not implementation.

NEXT STEP

Request a free assessment.

Visit meridian.tokyo/assessment and tell us briefly about your business. Within 48 hours you’ll receive a written initial diagnosis: typical leakage patterns in your industry, three likely problems specific to your situation, and the hardest questions you should be answering.

No commitment, no sales call. If after the diagnosis we both agree it’s a fit, we propose terms. If not, you keep the diagnosis and this sample.