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## 30–60–90 Day Post-Sale Operating Plan

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*How I take control of post-sale revenue without disrupting momentum*

### Guiding Principles

Before the timeline, there are three operating truths:

1. I optimize for **clarity before change**
2. I stabilize the system before I accelerate it
3. I replace founder dependency with governance—not distance

This plan is not a “first 90 days of meetings.” It’s a deliberate transition from intuition to control.

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### Days 1–30: Visibility & Signal Integrity

**Objective: Eliminate blind spots and reduce uncertainty**

The first 30 days are about **seeing reality clearly**—not fixing everything at once.

#### Focus Areas

- Customer risk visibility
- Lifecycle signal integrity
- Founder and exec confidence

#### What I Do

##### 1. Establish a single view of post-sale reality

- Review current retention, renewal, expansion, and churn data

- Validate accuracy and consistency across CS, Support, PS, Sales, and Finance
- Identify where intuition is filling gaps data should cover

## 2. Map the customer lifecycle as it actually operates

- Onboarding → adoption → renewal → expansion (real paths, not slides)
- Where ownership is clear vs ambiguous
- Where escalations, exceptions, and founder involvement appear

## 3. Identify leading risk and value signals

- Product usage, behavior, support patterns, delivery friction
- What signals exist today vs what's missing
- How early risk is currently visible before revenue impact

## 4. Reduce founder escalation load immediately

- Clarify interim ownership and decision rights
- Create short-term escalation rules that prevent unnecessary pull-ups
- Stabilize the system without removing founder visibility

## Outputs by Day 30

- Clear view of **where revenue risk lives**
- Early risk signals validated or corrected
- A realistic picture of renewal and expansion predictability
- Reduced executive anxiety—because ambiguity is shrinking

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## Days 31–60: Governance & Operating Model Alignment

### Objective: Replace intuition with repeatable operating discipline

This phase turns visibility into **control**.

### Focus Areas

- Lifecycle governance
- Renewal and expansion mechanics
- Cross-functional alignment

## What I Do

### 1. Codify lifecycle ownership and plays

- Define who owns onboarding success, adoption health, renewals, and expansion
- Standardize plays for:
  - At-risk customers
  - On-track renewals
  - Expansion-ready accounts
- Eliminate “special cases” as a default behavior

### 2. Implement governed renewal and expansion motion

- Introduce renewal forecasting tied to customer health—not hope
- Align renewal timing, inspection cadence, and exec visibility
- Define expansion triggers based on value realization

### 3. Align teams around a shared definition of “healthy”

- CS, Support, PS, Product, and Sales operate from the same signals
- SLAs and expectations clarified where handoffs exist
- Reduce internal friction and duplicated effort

### 4. Introduce a post-sale operating cadence

- Weekly risk and health inspection
- Monthly renewal and expansion review
- Executive-level summary focused on decisions, not reporting

## Outputs by Day 60

- Renewals and expansion are **forecastable**
- Teams operate with clearer ownership and less escalation
- Founders spend less time “in the middle” while retaining confidence
- Post-sale shifts from reactive to managed

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## Days 61–90: Leverage, Scale, and Predictability

**Objective: Make the system work without heroics**

The final phase is about **making results repeatable**.

### Focus Areas

- Cost-to-serve optimization
- Expansion scalability
- Team autonomy and confidence

### What I Do

#### 1. Optimize cost-to-serve and capacity

- Segment customers by value and service intensity
- Align coverage models accordingly
- Identify where effort is not producing proportional return

#### 2. Strengthen expansion as a designed motion

- Ensure expansion follows realized value—not escalation
- Refine triggers, timing, and ownership
- Reduce reliance on ad hoc opportunities

#### 3. Harden the system for scale

- Test whether the model holds as volume increases
- Identify pressure points before they break
- Adjust governance—not headcount—first

#### 4. Lock in executive and board-ready reporting

- Finalize a small, trusted post-sale scorecard
- Ensure forecasts are defensible and explainable
- Shift board conversations from uncertainty to choice

## Outputs by Day 90

- Retention and expansion behave predictably
  - Cost-to-serve trends in the right direction
  - Teams operate calmly without founder intervention
  - Leadership regains time and confidence
  - Post-sale is no longer a source of anxiety
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## What Changes for the Founder or CEO

By the end of 90 days:

- You are no longer the escalation path
- Renewals stop being surprises
- Expansion becomes intentional
- Forecast conversations stabilize
- The organization depends on systems—not heroics

This is not about working harder. It's about making outcomes inevitable.

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## Closing Note

Every company is different, but the approach is consistent.

I don't bring a template. I bring a way of **seeing, governing, and scaling post-sale revenue** that has held up across stages, products, and markets.

If this plan resonates, the conversation is worth having.