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The Post-Sale Revenue Operating System

How retention, renewals, and expansion become predictable

This playbook outlines how I design and operate post-sale organizations as **revenue systems**, not collections of roles, tools, or best intentions.

The goal is not activity. The goal is **control, leverage, and durability**.

The Core Premise

Post-sale revenue breaks down when it relies on:

- Heroics instead of systems
- Sentiment instead of signals
- Escalation instead of governance

A post-sale revenue operating system replaces intuition with structure—so outcomes become repeatable regardless of scale, customer mix, or team size.

The Four Pillars of the Operating System

Every durable post-sale organization rests on four pillars. Miss one, and the system degrades.

1. Lifecycle Architecture

From onboarding to expansion—by design

Post-sale begins the moment a deal closes.
Revenue durability depends on what happens next.

Lifecycle Stages

1. **Onboarding & Activation**
Customers reach first value quickly and predictably.
2. **Adoption & Value Realization**
Usage translates into measurable business outcomes.
3. **Renewal Readiness**
Renewal is a managed process—not a last-minute event.
4. **Expansion Eligibility**
Growth follows demonstrated impact, not pressure.

Operating Rules

- Each stage has **clear ownership**
- Progression is driven by **signals, not time**
- Customers cannot advance without meeting defined success criteria

Outcome: Lifecycle motion becomes visible, inspectable, and governable.

2. Risk & Value Intelligence

Seeing reality early

The system is only as strong as its signals.

What I Measure

- Product usage patterns tied to outcomes
- Behavioral indicators (engagement, responsiveness, friction)
- Support and services signals
- Delivery delays and scope creep
- Expansion readiness indicators

What I Avoid

- Over-engineered health scores
- Black-box AI with no explainability
- Vanity metrics that look good but predict nothing

Design Principle

Signals must answer one question clearly:

“What should we do differently right now?”

Outcome: Risk appears months earlier. Intervention becomes calm and proactive.

3. Renewal & Expansion Governance

Turning hope into forecastable revenue

Renewals and expansion are not sales events.
They are **operating motions**.

Renewal Governance

- Renewal timing, inspection, and ownership defined in advance
- Forecasting tied to customer health—not optimism
- Executive visibility focused on decisions, not status

Expansion Mechanics

- Expansion eligibility requires realized value
- Triggers are explicit and repeatable
- Ownership is clear (Product-led, CS-led, Services-led)
- Ad hoc expansion is the exception—not the system

Outcome: Revenue behaves as expected. Forecasts stabilize.

4. Cost-to-Serve & Leverage

Scaling without burning people or margin

Growth without leverage is fragility.

How I Create Leverage

- Segment customers by value and service intensity
- Align coverage models accordingly
- Standardize plays to reduce cognitive and operational load
- Fix root causes instead of absorbing pain with headcount

Key Principle

Effort should decline as the company scales—not increase.

Outcome: Margins improve. Teams stay calm. Scale feels controlled.

The Operating Cadence

How the system stays healthy

A system only works if it's inspected.

Weekly

- Customer health and risk review
- Clear actions, owners, and timelines

Monthly

- Renewal and expansion forecast review
- Capacity and cost-to-serve check

Quarterly

- Lifecycle performance review
- Signal quality audit
- Playbook refinement

Meetings exist to make decisions, not share updates.

The Executive Scorecard

What leadership actually needs to know

I keep leadership focused on a small, trusted set of metrics:

- Net Revenue Retention (NRR)
- Gross Revenue Retention (GRR)
- Forecast Accuracy
- Time to Value
- Cost-to-Serve by Segment
- PS Utilization & Margin
- Risk Detection Lead Time

If the scorecard can't explain performance, it gets changed.

What This System Replaces

- Founder escalation → **governed ownership**
- Last-minute renewals → **managed motion**
- Expansion luck → **designed growth**
- Busy teams → **leveraged teams**
- Anxiety → **confidence**

What Changes When This Is in Place

- Retention stops being a surprise
- Expansion becomes intentional
- Forecasts are defensible at the board level
- Teams operate without heroics
- Founders get their time back—without losing control

Post-sale becomes an asset, not a liability.

Final Note

This is not a framework for show. It's how I've operated post-sale organizations across stages, industries, and levels of complexity.

I don't bring tools first. I bring **structure, clarity, and discipline**, and the tools follow.

If this way of operating resonates, the conversation is worth having.