

Patrick Steven Ferdig

pat@patferdig.com | +1 (253) 222-9570 | University Place, WA | [linkedin.com/in/pat-ferdig/](https://www.linkedin.com/in/pat-ferdig/)

LEADERSHIP THESIS

How I build post-sale organizations that scale trust, revenue, and impact

I believe world-class post-sale organizations are not support functions. They are revenue engines and trust accelerators.

In growing SaaS and AI companies, retention, expansion, and customer confidence don't fail because teams lack effort or care. They fail because the operating model doesn't scale. My leadership philosophy is centered on fixing that—by embedding intelligence, accountability, and repeatability into every stage of the customer lifecycle.

Post-sale should not simply retain customers. It should enable outcomes, expand value, and earn institutional trust at scale.

MY OPERATING PHILOSOPHY

OUTCOMES FIRST. REVENUE FOLLOWS

Customer outcomes are the leading indicator of durable growth.

I design lifecycle journeys that prioritize adoption, time-to-value, and realized impact—not superficial engagement. Expansion is earned through measurable results, not pressure or escalation. Predictive health signals and behavioral telemetry surface risk early, allowing teams to act before revenue is at stake.

When outcomes are clear and consistent, revenue becomes predictable.

MONETIZATION THROUGH VALUE, NOT ACCESS

I don't believe in monetizing friction or information asymmetry.

Premium services (training, certification, advisory, and enablement) must have a clear ROI and a direct connection to customer outcomes. Enablement is tied to value realization, not feature usage. Services scale without compromising customer trust or long-term equity.

Access alone is not value. Impact is.

VELOCITY WITH PRECISION

Speed matters, but only when paired with discipline.

I operate on an 80/20 mindset: move quickly, learn fast, and institutionalize what works. Reusable assets—onboarding frameworks, success playbooks, renewal motions—create leverage. Clear SLAs, aligned OKRs, and defined ownership allow teams to act autonomously without chaos.

The goal is momentum without entropy.

TRUST BY DESIGN

In enterprise, AI, and regulated environments, trust is not a promise. It's an operating requirement.

I build post-sale systems that are audit-ready, security-conscious, and resilient by design. Compliance, data privacy, and uptime are treated as product features, not afterthoughts. Workflows are transparent, defensible, and dependable under scrutiny.

Trust scales when it's engineered, not improvised.

SCALE TEAMS THROUGH CULTURE AND CLARITY

Headcount does not equal capacity.

I build coaching-driven teams with clear career paths, distributed ownership, and feedback loops that compound learning. Pod-based models, regional playbooks, and hybrid skill sets preserve agility as organizations grow.

Strong culture is not performative. It's operational.

MEASURE WHAT MATTERS

What I Measure and Why

I build scorecards the focus on revenue durability, scale readiness, and risk.

Metrics exist to guide decisions, not decorate dashboards. As you will see I focus on 7 data pillars to drive insight, accountability and transparency:

1. REVENUE DURABILITY AND PREDICTABILITY

What will happen, and how confident are we?

Metric	Why It Matters
Net Revenue Retention (NRR)	Ultimate indicator of post-sale ROI and expansion health
Gross Revenue Retention (GRR)	Baseline signal of customer trust and value durability
Renewal Forecast Accuracy	Board confidence in revenue planning
Renewal Coverage Ratio	Measures renewal pipeline sufficiency vs. upcoming book
Renewal Slip Rate	Tests execution discipline and operating rigor

Signal: Revenue is governed, not hoped for.

2. VALUE REALIZATION & ADOPTION HEALTH

Why customers renew and expand

Metric	Why It Matters
Time to First Value (TTFV)	Speed of initial customer impact
Time to Sustained Value	Predicts long-term retention
Adoption Velocity	Leading indicator of expansion potential
Outcome Attainment Rate	Confirms customers achieve stated business goals

Signal: Expansion follows value realization—not pressure.

3. COST-TO-SERVE & OPERATING LEVERAGE

Whether growth improves margins or erodes them

Metric	Why It Matters
Cost-to-Serve by Segment	Identifies profitable vs. fragile customer cohorts
Customer Coverage Ratios	Tests staffing efficiency and scale readiness
Support Tickets per Customer	Proxy for product maturity and enablement quality
Escalation Rate	Early warning of system breakdowns

Signal: The business scales through leverage, not labor.

4. PROFESSIONAL SERVICES & DELIVERY ECONOMICS

Often ignored. Always felt.

Metric	Why It Matters
PS Utilization Rate	Capacity efficiency and burnout risk
PS Gross Margin	True contribution of services to unit economics
Billable vs. Non-Billable Ratio	Reveals hidden product or enablement debt
Time to Implementation / Go-Live	Direct driver of Time-to-Value
Implementation Rework Rate	Signals scope, product, or expectation misalignment

Signal: Services accelerate value instead of subsidizing dysfunction.

5. EXPANSION MECHANICS

How scalable growth actually happens

Metric	Why It Matters
Expansion Attach Rate	Predictability of growth beyond base renewals
Expansion Source Mix	Product-led vs. human-led scalability
Expansion Win Rate	Validates value-based monetization

Signal: Growth is intentional, not accidental.

6. OPERATING DISCIPLINE & SYSTEM HEALTH

Can the model run without escalation?

Metric	Why It Matters
Risk Detection Lead Time	How early churn risk is visible before revenue impact
Playbook Adherence Rate	Whether teams operate the system or improvise
Cross-Functional SLA Compliance	GTM alignment across CS, Support, PS, Product
Founder / Exec Escalation Frequency	One of the strongest indicators of maturity

Signal: The system works without founders being the glue.

7. PEOPLE SUSTAINABILITY

Whether performance is repeatable

Metric	Why It Matters
CSM / PS Attrition	Continuity risk and customer trust erosion
Time to Productivity (Ramp)	Quality of enablement and role clarity
Span of Control by Function	Early indicator of overload and degradation

Signal: Results are durable because teams are.

WHY IT WORKS IN HIGH-STAKES ENVIRONMENTS

Across SaaS and AI companies at different stages and levels of complexity, I've led post-sale organizations through growth, transformation, and scrutiny.

The lesson has been consistent: **speed, trust, and clarity are non-negotiable.**

When onboarding, enablement, success, and intelligence operate as a single system, post-sale becomes a force multiplier, not a cost center. Revenue stabilizes. Confidence rises. And customer trust becomes a durable advantage.

That is the work. That is the philosophy.