

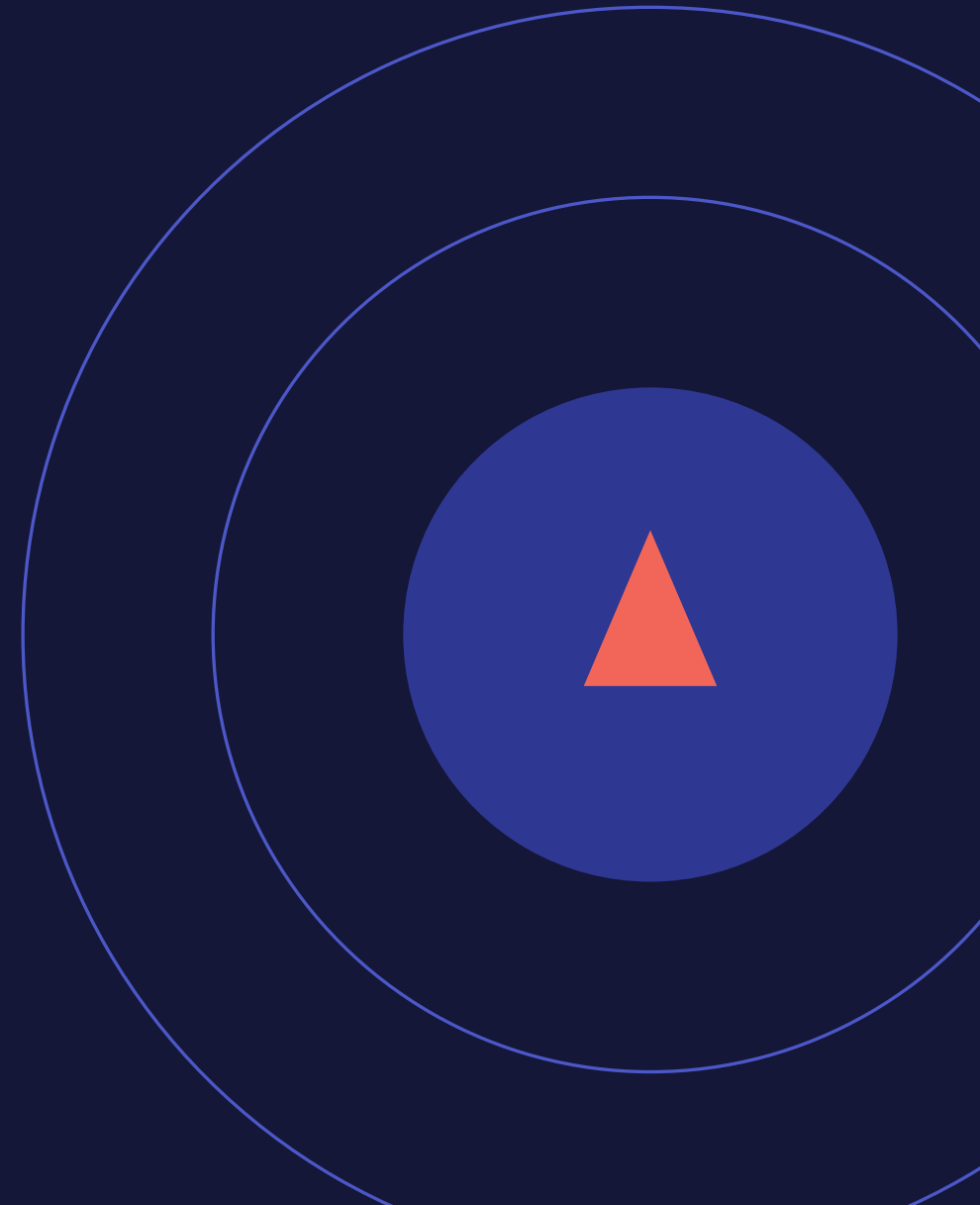


FY2027 STRATEGIC PLAN

Turning data into decisions, at scale

Leadership Offsite · November 2026

Northbeam Analytics is a fictional company created for a Kelsey Renée Creative Studios portfolio demonstration.



FY2027 at a glance

01

Grow ARR from \$48.6M to \$64M

Driven by mid-market expansion and new-product revenue.

02

Launch Northbeam Pulse

Real-time forecasting for operations teams, generally available in Q2.

03

Enter two new verticals

Dedicated go-to-market teams for public sector and higher education.

FY2027 TARGETS

\$64M

Annual recurring revenue

120%

Net revenue retention

+85

New team members

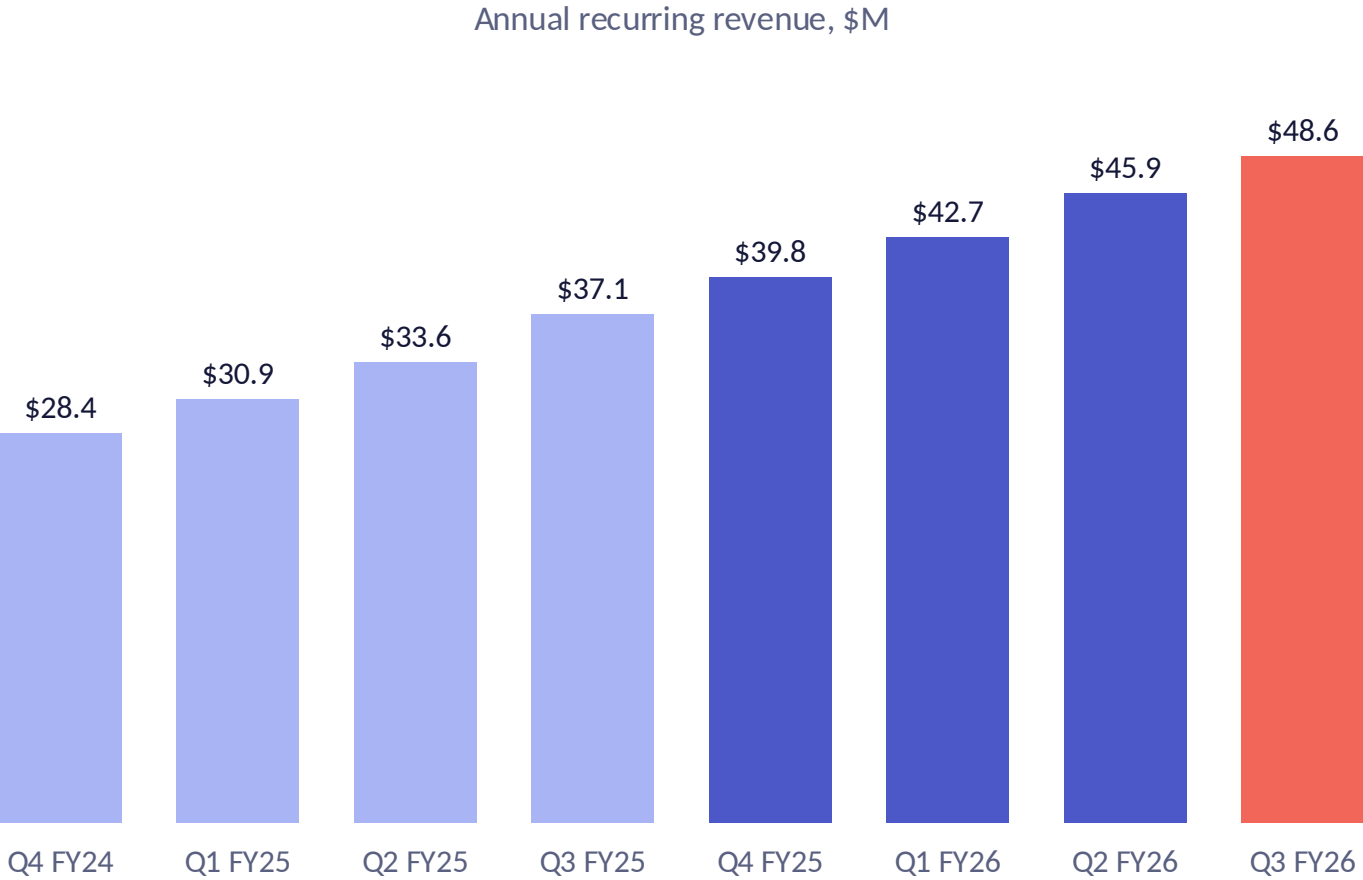
FY2026 was our strongest year yet



Expansion revenue from existing customers contributed 54% of net new ARR, up from 41% in FY2025, a sign that customers are finding more value as they grow with us.

FY2026 figures are forecast close as of October 2026. All data is fictional.

ARR has grown for eight straight quarters



WHAT DROVE IT

58%

of new ARR came from mid-market accounts

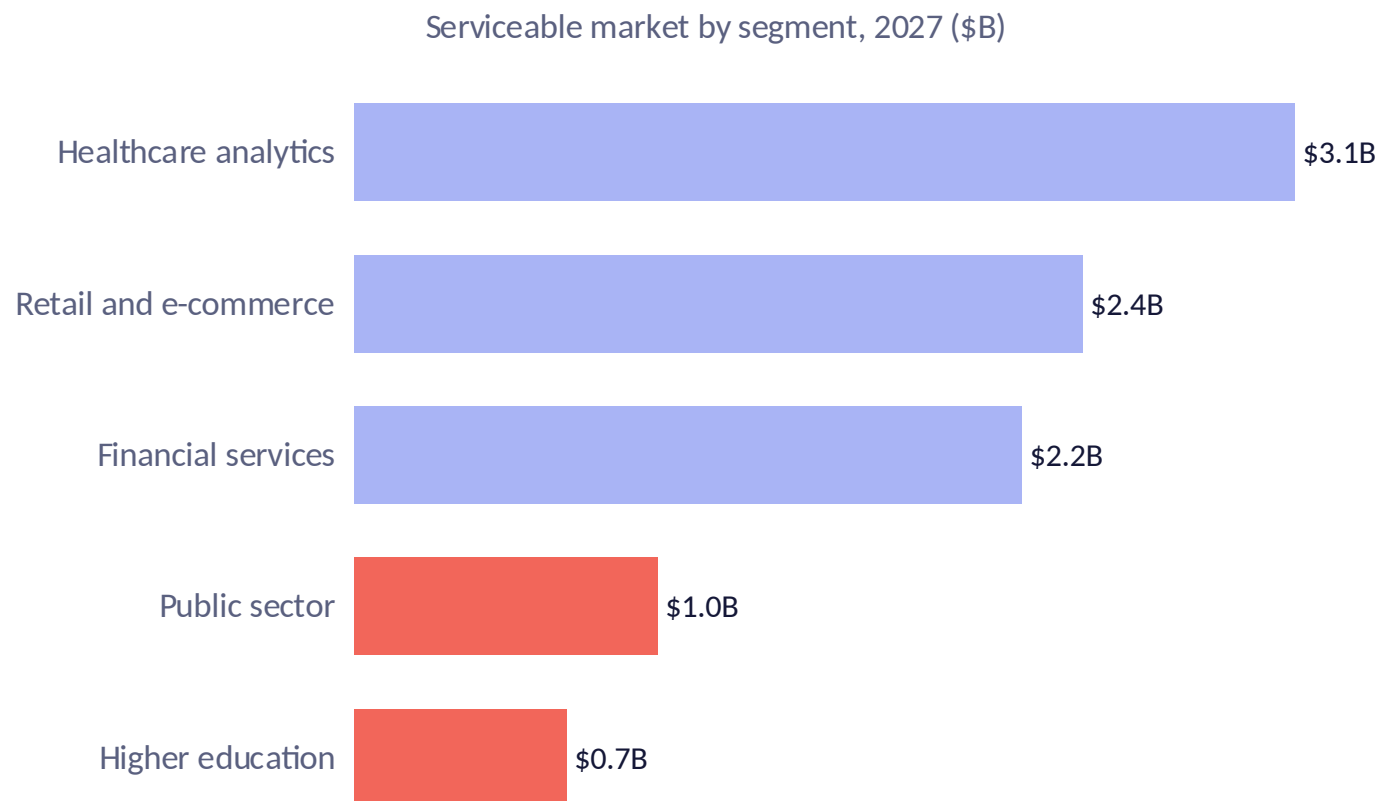
\$39.2K

average contract value, up 19%

5.8%

annual logo churn, our lowest yet

A \$9.4B market growing 17% a year



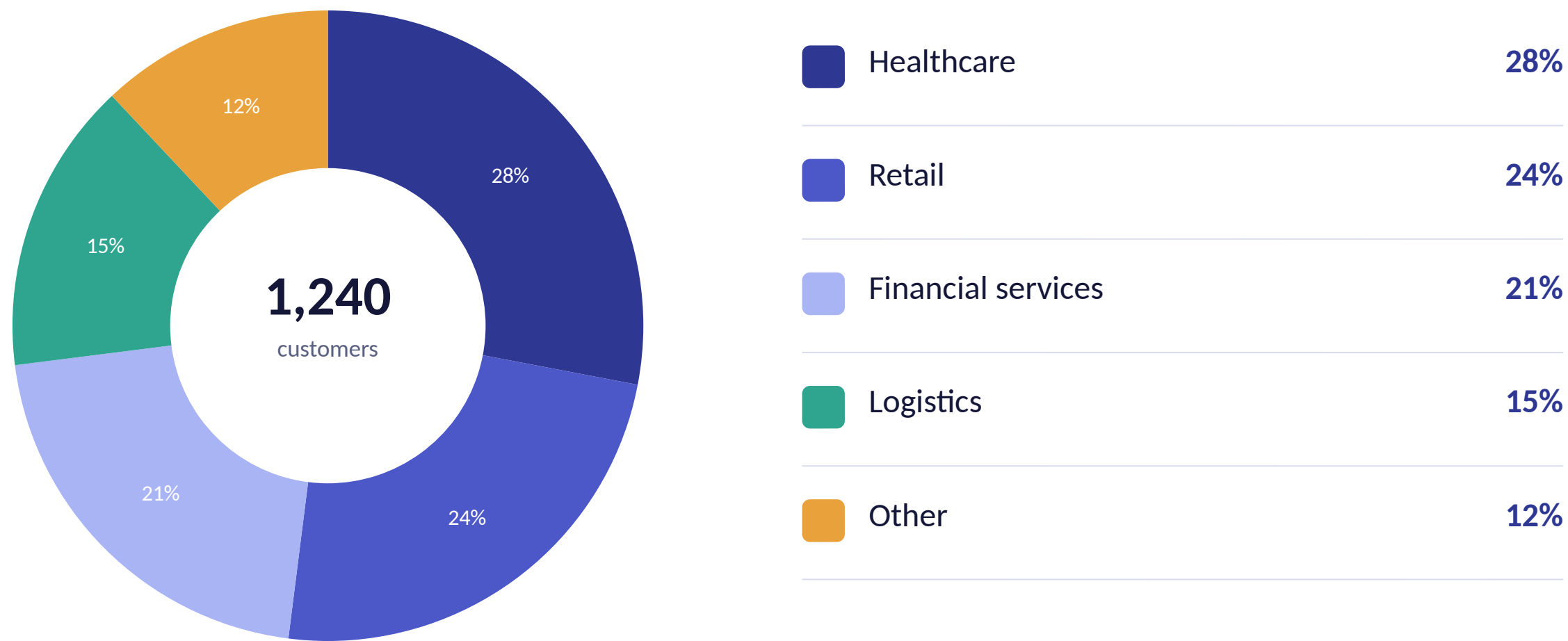
Source: Northbeam market analysis, 2026. Fictional data.

THE OPENING

24% and 21%

Annual growth in public sector and higher education, the two fastest-growing segments, where no single provider holds more than 12% share.

No single industry is more than 28% of revenue



Three pillars carry the plan

1

PLATFORM

Launch Northbeam Pulse

Real-time forecasting that turns daily operating data into next-week decisions.

Target 150 Pulse customers by Q4

2

EXPANSION

Win two new verticals

Dedicated teams, partners, and compliance for public sector and higher education.

Target \$4.5M new-vertical ARR

3

PEOPLE

Scale with intention

Hire 85 people while protecting culture through structured onboarding and manager training.

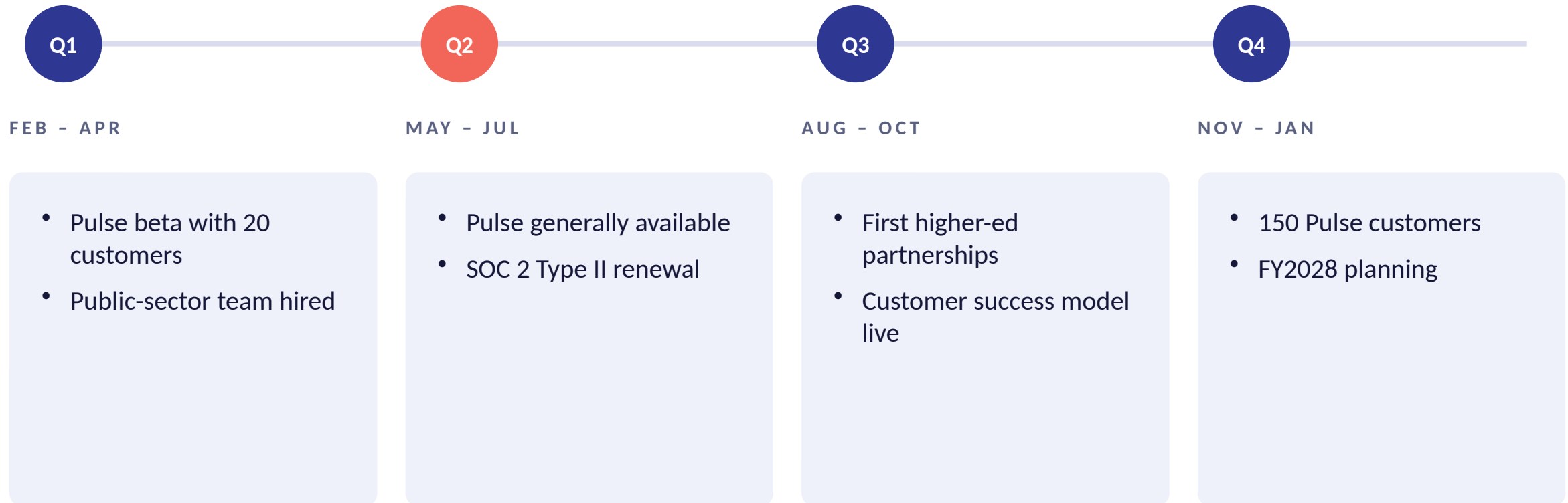
Target Engagement score of 80+

FY2027 priorities, owners, and targets

Initiative	Owner	Q4 FY27 target	Status
Launch Northbeam Pulse	Product · A. Okafor	150 customers	● On track
Public-sector go-to-market	Sales · M. Delgado	\$2.8M ARR	● Planning
Higher-education partnerships	Partnerships · J. Kim	12 institutions	● Planning
Customer success redesign	Success · R. Patel	120% NRR	● On track
SOC 2 Type II renewal	Security · L. Brennan	Certified by Q2	● On track
Hiring and onboarding	People · T. Nguyen	85 hires	● At risk

Owners and names are fictional.

Roadmap: four quarters, one plan



Fiscal year runs February through January. Pulse general availability (Q2) is the key milestone.

Risks we're watching, and our response

Talent market

Risk Senior engineering roles take 70+ days to fill.

Response Referral program, two recruiting partners, and a structured interview loop.

Longer sales cycles

Risk Public-sector deals can take 9 to 12 months to close.

Response Cooperative purchasing contracts and a partner-led sales motion.

Pricing pressure

Risk Two competitors cut list prices by 15% this year.

Response Lead on value: Pulse bundles and outcome-based case studies.

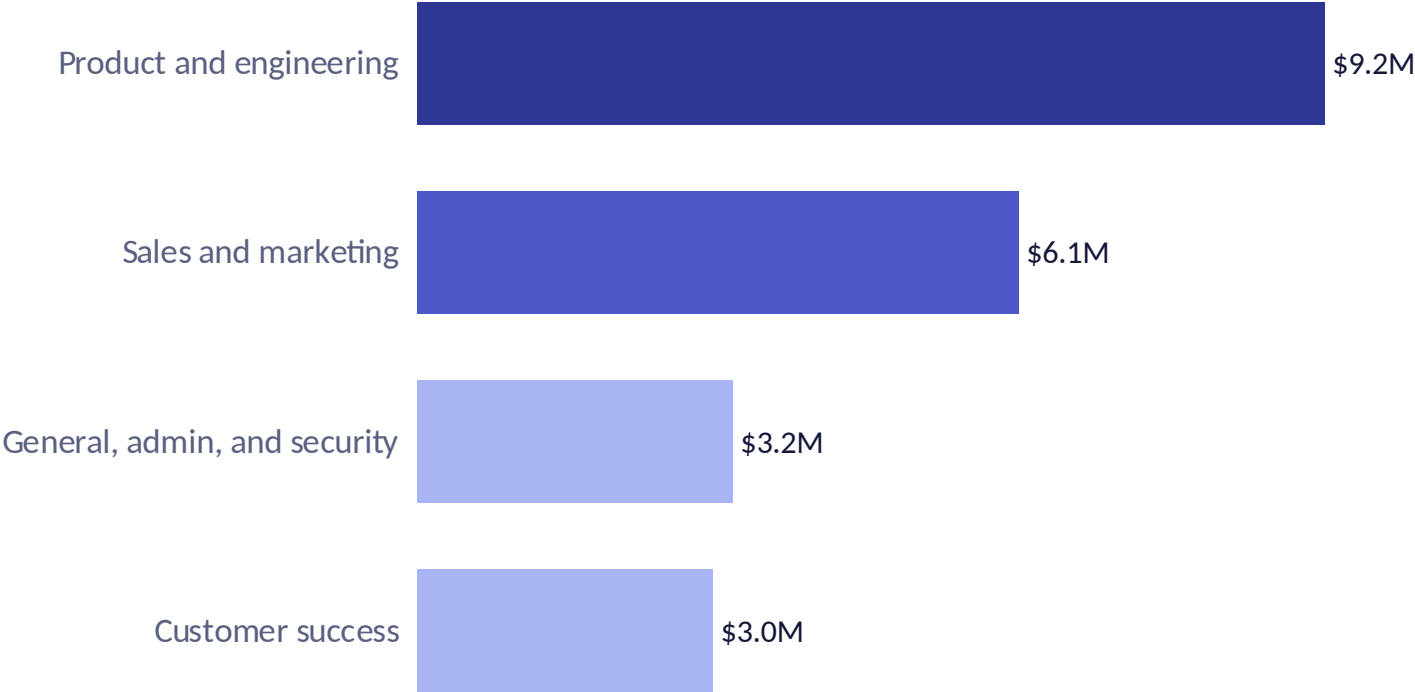
Privacy regulation

Risk New state privacy laws take effect in 2027.

Response Privacy review in every release; counsel engaged for public sector.

Where the \$21.5M investment goes

FY2027 operating budget by function (\$M)



TOTAL BUDGET

\$21.5M

+22% over FY2026

62% of new spending funds the two growth pillars: Pulse and new-vertical expansion.

DECISIONS NEEDED TODAY

Three approvals move the plan forward

01

Approve

the FY2027 operating budget of
\$21.5M

02

Endorse

the public-sector go-to-market plan
and hiring

03

Confirm

Northbeam Pulse launch pricing by
December 15

Questions and discussion · strategy@northbeam.example