



SAGENTIX
Advisors

Sample Deliverables Brief

Prepared for: Scotiabank Business Banking

Prepared by: Sagentix Advisors

April 2026

CONFIDENTIAL



Sample Deliverables Brief

Representative excerpts from a completed 10-phase engagement

Prepared for Scotiabank Business Banking Team

Source Sagentix Advisors Inc. internal reference engagement (Sagentix GTM 2026-Q1), reproduced verbatim from the firm's own files

What this document is, and what it is not

■ **THIS IS AN EXTRACT — NOT A FULL DELIVERABLE.** What follows are brief excerpts pulled from four of the ten phase documents in a completed Sagentix engagement. Each real phase is a **60–130 page** stand-alone research deliverable; this entire brief totals nine pages. The excerpts are chosen to show format and rigor, not to reproduce the plan itself. A full Scotiabank-referred engagement produces **approximately 600–900 pages of written deliverables across the ten phases**, plus executive PowerPoint, phase briefs, and a complete evidence archive.

This is a curated tour of the **format and rigor** Scotiabank-referred clients will receive. The excerpts below are drawn from a completed ten-phase engagement in which Sagentix Advisors was itself the client — meaning every claim, number, and citation can be reproduced on request, and no third-party confidentiality is compromised.

We focus on the **four phases most relevant to a credit officer**: Phase 01 (Market Intelligence), Phase 06 (Pricing Strategy), Phase 07 (Business Model / Unit Economics), and Phase 08 (Strategy Execution). **Every figure below is reproduced as it appears in the source Sagentix draft.** Where the document uses an inferred metric, we mark it clearly.

This is not a sample plan for a Scotiabank client. It is a specimen of method — how a plan is built, formatted, and evidenced.



Actual scale of a Full GTM engagement

Phase	Topic	Source draft size	Final PDF size
01	Market Intelligence	1,490 lines	~88 pages
02	Value Proposition	1,452 lines	~92 pages
03	Messaging	1,800 lines	~131 pages
04	Pitch Deck	1,027 lines	~79 pages
05	Sales Process	1,417 lines	~95 pages
06	Pricing Strategy	775 lines	~60 pages
07	Business Model	866 lines	~70 pages
08	Strategy Execution	1,244 lines	~95 pages
09	Digital Audit	1,289 lines	~95 pages
10	Evidence Discipline	1,063 lines	~85 pages
—	Full GTM total	12,423 lines	~890 pages

Line counts are from the Sagentix GTM 2026-Q1 reference engagement as of April 2026. PDF page counts are approximate, rendered at Sagentix's standard branded format with tables, figures, and reference sections.

Phase 01 — Market Intelligence (excerpt)

Sample SCQA executive briefing as it appears in the client's final PDF.

Executive Briefing: AI-Powered Productized GTM Advisory Creates a Structural Disruption Opportunity in the \$300B+ Management Consulting Market

Situation. The global management consulting market generates \$358–492B annually (Mordor Intelligence, 2026; Fortune Business Insights, 2026). Canada's management consulting industry is valued at C\$27.5B (US\$20.1B at 0.73 CAD/USD) with 94,900 establishments, growing at 6.38% CAGR through 2030 (Mordor Intelligence, 2026; Vertical IQ, 2026, NAICS 541611).

Complication. Three structural forces have made the traditional consulting model untenable for mid-market B2B technology companies. First, AI is automating 40% of consulting tasks (Gartner, 2026). Second, the market is bifurcating: the "mid-market squeeze" is eliminating generalist firms. Third, B2B technology companies in the \$2M–\$50M ARR range remain structurally underserved. The Big Four hold 75% of Canada's addressable \$5.2B consulting segment (Mordor Intelligence, 2026).

Question. How should Sagentix Advisors Inc. position its AI-powered, productized GTM advisory platform to capture the emerging opportunity in serving mid-market B2B technology companies?

Answer. Sagentix should position as Canada's first AI-powered, productized GTM advisory firm targeting B2B technology companies in the \$2M–\$50M ARR range. By delivering a structured 10-phase methodology at price points (\$4K–\$50K CAD) that sit between enterprise consulting minimums and DIY tool costs, Sagentix addresses the structural underservice gap.

[In the full draft the executive briefing continues with a "5 Key Takeaways" list in which every bullet resolves to a named in-text citation. The References section at the back of the document spans



multiple pages and names every cited source with page references where available.]

Sample Output — TAM/SAM Methodology

The Phase 01 market sizing is built bottom-up across thirteen industry segments, with two independent sensitivity layers.

Layer	Figure (USD)	Methodology
TAM — Total Addressable	\$297M	Bottom-up across 13 Vertical IQ industry profiles, each with an explicit fit-percentage rationale
TAM — Sensitivity range	\$238M – \$356M	Optimistic / pessimistic fit-% stress across the four largest segments
SAM — Three-filter	\$4.4M	Each TAM segment multiplied by Tech Fit % x Customer Fit % x Access % (10 segment rows)
Top 3 SAM segments		Mgmt Consulting GTM niche \$1,096K · Cybersecurity \$933K · NRC IRAP Channel \$729K

Sample Output — Five-Year SOM Scenarios (Phase 01)

Scenario	Key assumptions	Y1 revenue	Y3 cumulative	Y5 cumulative	Y5 team
Bull	IRAP accepted Q1, 3 Full-GTM anchors, aggressive (35%) CI conversion, sales hire Q2 Y1, 30 Y1 engagements	\$380K	\$3.2M	\$8.4M	9–10
Base	Standard execution — 25 Y1 engagements, sales hire Q3, 20–25% CI conversion	\$290K	\$2.2M	\$5.9M	8
Bear	IRAP delayed 12 months, slow brand traction, 15 Y1 engagements, 10% CI conversion, founder-only through Y1	\$155K	\$900K	\$2.8M	4–5

Probability-weighted 5-year cumulative expected value: \$5.75M (25% Bull x \$8.4M + 50% Base x \$5.9M + 25% Bear x \$2.8M).

The Bull/Bear spread on Y5 annual revenue is 3.2:1. The two largest swing factors are speed of sales hire and CI conversion rate. The delivery capacity ceiling is 52 engagements per person per year — the Bear scenario is NOT delivery-constrained; even at 15 engagements the founder runs at 29% utilization. The Bear reflects pure sales/market-access risk, not capacity limitation.

Full Phase 01 deliverable: 1,490 lines, ~88 PDF pages, 13 Vertical IQ industry profiles, 12 web searches, 8 knowledge-validation queries, 48 claims verified (0 CONTRADICTED).

Phase 06 — Pricing Strategy (excerpt)

Sample pricing architecture review from a client's final PDF.



Current Tier Assessment

Tier	Price (CAD)	Price (USD)	Phases	Duration	Target buyer
Ideation Validation	\$4K–\$5K	\$2.9K–\$3.7K	Phase 1	~1 week	Pre-revenue founders
GTM Foundation	\$12K–\$15K	\$8.8K–\$11K	Phases 1–3	2–3 weeks	Growth companies (entry)
Revenue Architecture	\$25K–\$30K	\$18.3K–\$21.9K	Phases 1–6	4–5 weeks	B2B SaaS / Cyber (primary)
Full GTM	\$40K–\$50K	\$29.2K–\$36.5K	Phases 1–10	6–8 weeks	Enterprise buyers
Continuous Intelligence	\$3K–\$5K/mo	\$2.2K–\$3.7K/mo	Ongoing	Monthly	All engaged clients
NRC IRAP MAS	\$7K fixed CAD	\$5.1K	Phase 1 (40 hrs)	~1 week	IRAP-eligible SMEs (gov-funded)

Willingness-to-Pay — Buyer Segment Match

Buyer segment	Typical S&M programs budget	Sagentix tier match	Price as % of budget
B2B SaaS (\$5–20M ARR)	\$315K–\$1.25M	Revenue Architecture	1.5–7%
B2B SaaS (\$2–5M ARR)	\$120K–\$375K	GTM Foundation	2.3–9.2%
Cybersecurity (\$10–50M ARR)	\$750K–\$6.25M	Full GTM	0.5–4.9%
IRAP-funded SME	CA\$7K (government allocation)	NRC IRAP MAS	100% (subsidized)
Pre-revenue founder	\$10K–\$50K personal capital	Ideation Validation	5.8–37%

So What? For growth-stage companies (\$5M+ ARR), Sagentix's commercial tiers represent less than 7% of the annual programs budget — a level that typically requires only VP-level approval, not C-suite or board authorization. The only segment with structurally high price sensitivity is the \$2–5M ARR range, where the Phase 1 money-back guarantee mitigates risk.

Full Phase 06 deliverable: 775 lines, ~60 PDF pages, 8 web searches, 3 knowledge-validation queries, 17 claims verified.

Phase 07 — Business Model / Unit Economics (excerpt)

Sample unit-economics dashboard from a client's final PDF — the section a credit committee will scrutinize most closely.



Core Unit Economics (verbatim)

Metric	Sagentix (estimated)	SaaS benchmark	Source
Weighted ACV	\$10.7K	\$15K–\$40K (SMB)	Sagentix Phase 01; Optifai, 2026
Customer Acquisition Cost	\$2K–\$5K	\$5K–\$35K	Estimated (founder-led); GrowthSpree, 2026
CAC Payback Period	<1 month	8–18 months (SMB/MM)	Calculated; Proven SaaS, 2026
Average Customer Lifespan	3 years (with CI)	3–5 years	Estimated; SaaS median
LTV (Project Only)	\$10.7K	\$15K–\$40K	Sagentix Phase 01
LTV (Project + CI @ 40% attach)	\$32K–\$76K	\$80K–\$200K (MM)	Calculated
LTV : CAC Ratio	20:1 – 76:1	3:1 (minimum), 4:1–6:1 (top quartile)	Calculated; GrowthSpree, 2026
Gross Margin	78–85%	75–85% (SaaS), 50–70% (consulting)	Estimated; Mosaic, 2026
Net Revenue Retention (target)	130%+	105–110% (median), 120%+ (top quartile)	Target; Maxio, 2026

CAC Decomposition by Channel (verbatim)

Channel	Estimated CAC	Payback period	Volume capacity
NRC IRAP MAS	\$0 (government-funded)	Instant (negative CAC)	3–5/year
Founder-led outbound	\$2K–\$3K	<1 month	8–10/year
LinkedIn organic/ads	\$3K–\$5K	1–2 months	3–5/year
Referrals	\$500–\$1K	<1 month	2–4/year
HubSpot partner	\$1K–\$2K	<1 month	1–3/year
Blended CAC	\$2K–\$5K	<1 month	15–25/year



Cost Decomposition (verbatim)

Category	Annual cost (USD)	Per-engagement cost	Fixed / Variable
AI Platform (Claude API)	\$3.6K–\$7.2K	\$180–\$480	Variable
Vertical IQ Subscription	\$2.4K–\$4.8K	—	Fixed
Apollo.io Subscription	\$1.2K–\$2.4K	—	Fixed
HubSpot CRM	\$1.2K–\$3.6K	—	Fixed
LinkedIn Premium/Ads	\$2.4K–\$3.6K	—	Fixed
Professional Memberships	\$2.4K–\$3.6K	—	Fixed
Insurance (E&O)	\$2.4K–\$4.8K	—	Fixed
Web Hosting/Tools	\$1.2K–\$2.4K	—	Fixed
Misc (travel, printing, legal)	\$1.2K–\$2.4K	—	Mostly fixed
Total	\$18K–\$34.8K	\$180–\$480 variable	94–99% fixed

Break-Even Analysis (verbatim)

At the midpoint cost structure (~\$26K annual fixed costs) and weighted ACV of \$10.7K with 80% gross margin (\$8.6K contribution per engagement):

- **Break-even point: 3.0 engagements per year (~\$32K revenue)**
- **At 15 engagements (base case):** \$156K revenue · \$129K gross profit · **\$103K operating profit**
- **At 25 engagements (bull case):** \$267K revenue · \$214K gross profit · **\$188K operating profit**

The 94–99% fixed-cost structure creates extraordinary operating leverage — every engagement beyond the three-engagement break-even flows almost entirely to profit (\$8K+ marginal contribution each). The consulting industry norm for firms under \$5M revenue is 7.7–8.2% operating margin (Vertical IQ, 2026, NAICS 541611); Sagentix's AI-enabled structure inverts this.

Full Phase 07 deliverable: 866 lines, ~70 PDF pages, 6 web searches, 5 knowledge-validation queries.

Phase 08 — Strategy Execution (excerpt)

Sample 90-day action plan from a client's final PDF — the covenant the borrower owes to themselves.



Explore / Exploit Portfolio (verbatim)

Motion	Type	Capacity %	Weekly hours	Expected outcome
NRC IRAP MAS channel	Exploit	15%	6 hrs	3–5 Year 1 IRAP engagements
Direct B2B outbound	Exploit	20%	8 hrs	150+ conversations; 4–6 closed
Credential-led LinkedIn	Exploit	10%	4 hrs	500+ followers, 1,000+ impressions/mo
Referral network	Exploit	10%	4 hrs	2–3 engagements from referrals
Delivery excellence (first 10)	Exploit	15%	6 hrs	3–5 published case studies
Cybersecurity vertical partner pilot	Explore	10%	4 hrs	Validate CISO demand signal
HubSpot ecosystem partnership	Explore	10%	4 hrs	Partner directory placement
CI subscription conversion experiment	Explore	5%	2 hrs	1–2 CI subscribers
Ideation tier volume experiment	Explore	5%	2 hrs	Upgrade pipeline test
Total		100%		~46 hrs/week

Day-90 Go / No-Go Gate C (verbatim)

Proceed to Y1 Q2 scaling if all five conditions met:

1. \$50K+ cumulative revenue
2. 3+ published case studies
3. 1+ active CI subscription
4. NRC IRAP MAS status clear (accepted OR rejected with Plan B in motion)
5. Pipeline shows 10+ qualified opportunities for Q2

Pivot path (revenue \$20–\$50K): maintain pace; do not hire; reallocate Explore capacity; defer first hire until Day 180 minimum.

Stop & reassess path (revenue <\$20K): pause outbound; conduct Phase 01/05 post-mortem; test alternative positioning (cybersecurity-only, IRAP-only, Ideation-only); consider 60-day funded runway reserve before restarting.



Sprint 3 Output Metrics — Day 90 Red Thresholds (verbatim)

Metric	Target	Red threshold
Closed engagements (Day 90 cumulative)	3–5	0–2
Revenue (Day 90 cumulative)	\$50K+	<\$20K
Case studies published	3	0–1
CI subscriptions active	1–2	0
LinkedIn articles (Day 90 cumulative)	12	<8
LinkedIn followers	500+	<200
IRAP MAS status	Confirmed	Unknown after 90 days
Sales process documentation	v1.1 complete	v1 not documented

Pre-committing the decision logic to each outcome removes emotion from the decision moment. A borrower who has already authorized their own course correction is a lower-risk borrower.

Full Phase 08 deliverable: 1,244 lines, ~95 PDF pages, 6 web searches, 4 knowledge-validation queries, six operational KPIs with escalation rules, three innovation metrics (Learning Velocity, Leverage Ratio, Leadership Index).

What a client receives, in full

The extracts in this document represent **less than 2% of the content** produced in a Full GTM engagement. Here is the complete file manifest:

Artifact	Per phase	Total for Full GTM	Approximate size
Full phase document (branded PDF)	1	10	60–130 pages each · ~890 pages total
Full phase document (DOCX, editable)	1	10	Mirrors PDF
Phase Brief (McKinsey "In Brief" style, PDF + DOCX)	1	10	2–4 pages each
Executive PowerPoint (10 slides + speaker notes)	1	10	~20 slides with notes
Phase-specific infographic (PNG)	1	10	1 per phase
Final engagement presentation (12 slides, cross-phase synthesis)	—	1	~25 slides with notes
Work package (numbered phase folders + 00_START_HERE.pdf)	—	1	Full navigation cover + index
Complete evidence archive (every cited source retained, 7-year retention)	—	1	All source PDFs, web captures, data files



Every artifact passes a **16-check automated quality gate** before release (citation integrity, claim sourcing, anti-hallucination verification, regulatory-terminology accuracy, document-architecture conformance). Every in-text citation uses APA 7th edition format and resolves to a named source in the References section. The deliverables include an explicit third-party data disclaimer that licenses the research synthesis for client use without further licensing exposure.

Offer — full access to the live Intelligence Portal

*For Mark McInnis, Associate Team Lead, Scotiabank Business Banking. On request, Sagentix will whitelist your work email for private access to the live **Sagentix GTM 2026-Q1 Intelligence Portal** — the exact interactive dashboard a live client uses to consume their engagement.*

Portal URL — https://www.sagentix.ca/dashboard/Sagentix_GTM_2026Q1

Login — magic-link authentication. Mark enters his work email on the login page; the system emails back a one-click sign-in link. No passwords, no provisioning paperwork.

Access log — the portal maintains a named access audit trail; session logs are retained for seven years per Sagentix's CMC professional standards.

What the portal actually contains

The Sagentix client portal is not a static download page. It is an interactive Next.js dashboard organized around three top-level sections, with fifteen content tabs in total and D3-based data visualizations rendered live from the same JSON that drives the written deliverables.

Section 1 — ■ Your Package

This is the download hub for every static deliverable in the engagement. The Your Package view contains four blocks, top to bottom:

1. **Engagement Progress Hero** — client name, tier badge, "X of 10 phases complete", gold progress bar.
2. **Engagement Journey** — horizontal timeline with one node per phase (✓ for complete, number for pending), status label, and a "■ Files ready" indicator when deliverables are available.
3. **Phase Deliverables grid** — **one download card per phase**, each with a teal left-border for completed phases. Each card exposes direct links to all available files for that phase:
 - ■ **Full Report (PDF)** — the 60–130 page phase document (opens in new tab)
 - ■ **Executive Brief (PDF)** — 2–4 page McKinsey "In Brief" summary
 - ■ **Executive PPTX** — ~10 slides with speaker notes
 - ■ **Investor Pitch Deck (PPTX)** — Phase 04 only; the 14-slide master deck
 - ■ **Full Report (DOCX)** — editable version of the PDF
1. **Key Metrics cards** — headline engagement numbers (TAM / SAM / SOM and related KPIs).

Every file is directly downloadable from this single view — Mark can click through and retrieve all ~40 deliverables in a few minutes without navigating further.



Section 2 — ■ Work Products (one tab per phase)

Tab	Maps to	What the tab contains
Market Intelligence	Phase 01	TAM / SAM / SOM waterfalls, vertical fit analysis, industry breakdown
Competitive Landscape	Phase 01 §7	Interactive competitive positioning quadrant (D3), 13 competitor profiles
Value Proposition	Phase 02	JTBD statements, 6-role stakeholder map, VP stack
Messaging	Phase 03	Trust-Gap thesis, Message House, brand pillars
Pitch Deck	Phase 04	Master pitch deck renderer, proof-point requirements tracker
Sales Playbook	Phase 05	Buyer personas, SPIN/MEDDPICC stages, battle cards
Pricing	Phase 06	Four-tier architecture, WTP analysis, discount governance
Business Model	Phase 07	9-block Business Model Canvas, Unit Economics Dashboard, scenario analysis
Execution Roadmap	Phase 08	90-day sprint tracker, KPI dashboard, go/no-go gate status
Digital Audit	Phase 09	SEO posture, funnel conversion, remediation list
Evidence & Claims	Phase 10	Claims manifest, 6-tier evidence hierarchy, differentiator-evidence matrix

The Work-Product tabs are **interactive views only** — they render live data visualizations, claim tables, and drill-down analytics. The static PDF / DOCX / PPTX downloads for every phase are consolidated in the **Your Package** section (above).

Section 3 — ■ Collaboration

Tab	What it contains
Action Board	Cross-phase unified kanban; every pre-committed action from all ten phases in one view
Value & ROI	Value-tracker: quantified outcomes against original forecasts
Meeting Notes	Engagement notes, decision log
Feedback	Client sign-off history and feedback submissions

Portal utilities (header bar)

- **Export to PDF** — single-click export of the entire portal to a branded PDF (useful for credit-committee circulation)
- **Guided tour** — interactive walkthrough for first-time viewers
- **Freshness indicator** — timestamp of the most recent data refresh (e.g., "Updated 2026-04-22 22:32")
- **Dark mode toggle**
- **Tier badge (Full GTM)** — visible indication of engagement scope



The invitation, in one line

Read anything, download anything, verify anything. Pick five claims at random from the Phase Briefs, trace each one through the full phase document to the References section, open the cited source. If the discipline holds, the partnership idea stands on its own. If it does not, neither of us wants the arrangement.

How to request access

Email stephane@sagentix.ca with the subject line "**Scotiabank portal access — McInnis**" and the work email you want whitelisted. Access is typically active within a few hours.

Why we can offer this when other firms cannot

Sagentix is the only engagement we can expose in full, because Sagentix is its own client. Every other client engagement is covered by a mutual NDA and cannot be shared under any circumstance — not to a bank, not to a prospect, not to anyone. The Sagentix-on-Sagentix engagement exists precisely to solve this evidence-of-work problem. Everything you see on the portal is the real product, unredacted.

How to read a Sagentix plan

For a Scotiabank banker or underwriter opening a Sagentix-produced document for the first time, here is the reading order we recommend:

1. **Phase Brief (2–4 pages) first.** McKinsey "In Brief" format — situation, complication, question, answer, five key takeaways, metrics. If the credit story does not land in this document, nothing else will save the plan.
2. **Phase 07 Unit Economics Dashboard.** LTV, CAC, gross margin, payback, break-even. The single most load-bearing table in the plan.
3. **Phase 01 SOM Scenarios.** Bull / base / bear with probability-weighted 5-year expected value. The revenue ceiling against which the loan is sized.
4. **Phase 08 Day-90 Gate.** The pre-committed decision logic. What the borrower has said they will do if things go sideways.
5. **Phase 10 Evidence Archive (appendix).** Confirm-by-sampling: pick three claims from the executive summary, trace them through the document to the References section.

If all five read clean, the plan clears internal committee.

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