

## INVESTOR ADVISORY SERVICES

For several decades, Craton has collaborated with the leading ISVs in the Quote to Cash (Q2C) space, witnessing both remarkable successes and notable missteps. Today's Q2C landscape is a complex tapestry—ranging from established, proven providers to aging solutions striving for relevance, alongside a surge of startups poised to disrupt the market. Leveraging our deep expertise, Craton can help investors pinpoint high-value ISVs with the potential to thrive in this challenging arena. Moreover, following an investment or acquisition, we can play a pivotal role in scaling these ISVs to optimize returns on investment.



**Current,  
Competitive  
Market Analysis**



**Adjunct Q2C  
Operations  
Excellence**



**Enhance ISV  
Customer  
Success**



**Launch ISV  
Partner  
Ecosystem**



**Implementation  
Expertise & Best  
Practices**



**Talent  
Accelerator  
Services**

## KEY OFFERINGS TO SUPPORT Q2C ISV PORTFOLIO COMPANIES

### PRODUCT ROADMAP ADVISORY

**WHAT DOES THE MARKET  
NEED & WHERE WILL  
THE ISV WIN AT SCALE?**

- ICP & Target Market Focus
- Find competitive white space in Q2C
- Build 3yr roadmap to achieve financial goals
- Recommendations for inclusion of AI & Agentic AI

### CUSTOMER SUCCESS

**WHAT IS THE STRATEGY TO  
GROW REPUTATION BY  
STACKING CLIENT WINS?**

- Identify key clients to create anchor reference customers
- Build support structure for Enterprise Client & SI project assurance
- Co-market w/ key clients on webinars & at Q2C events

### ECOSYSTEM DEVELOPMENT

**WHAT IS THE STRATEGY TO  
ENABLE A BEST IN CLASS  
PARTNER ECOSYSTEM?**

- Identify & intro ancillary ISVs necessary to compete against incumbents
- Identify, intro & intentionally partner w/ select SIs to better serve ICP
- Establish your value w/ key Q2C analysts

### TRAINING & TALENT DEVELOPMENT

**WHAT METHODS WILL BE USED TO  
BUILD HIGH-PERFORMANCE &  
SCALE INTO THE BUSINESS?**

- Identify potential exec leaders & board members w/ appropriate Q2C gravitas
- Identify mid & senior talent across functions
- Proven tools to develop entry-level hard chargers in Q2C, including AI-enabled

## Craton Advisor Network - Delivering Outcomes

**Craton's in-house expertise is further enhanced by the broad capabilities of our Advisor Network.**

With over 15,000 deep industry connections and 200 years of combined experience in strategy, technology, operations, and finance, we unite our collective insights to guide businesses through the complexities of the Quote-to-Cash ecosystem, delivering impactful and sustainable results.



Tom Stergios



Kevin York



John McGregor



Lynn Mickleburgh



David Novak



Ted Brookbank



John Stame