

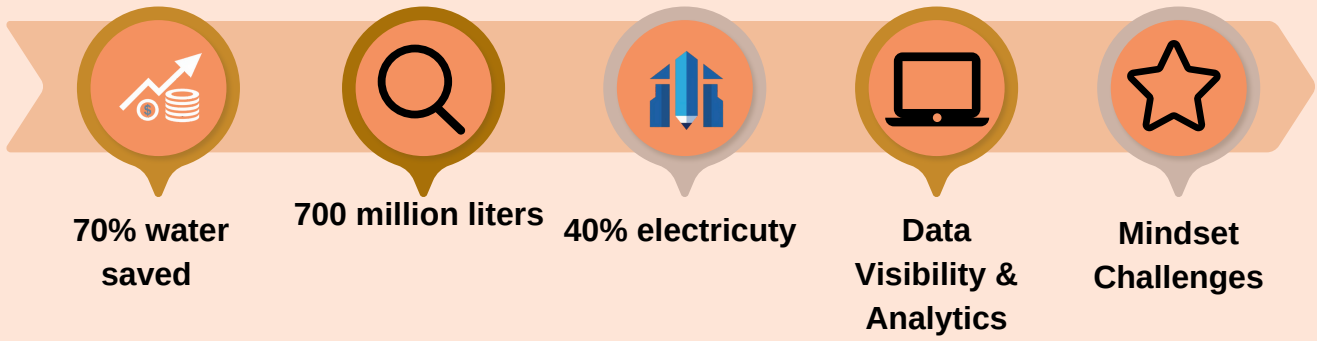
FROM STRATEGY TO SCALE:
THE SHAIL ADVISORS PLAYBOOK

Preventive Healthcare startup

Reverse six years of losses and drive multi-dimensional growth through cost optimization, data-led decisioning, product diversification and launching new business lines, delivering measurable performance and scalability

Key Challenges

Identify core challenges impacting growth trajectory and profitability levers



Impact

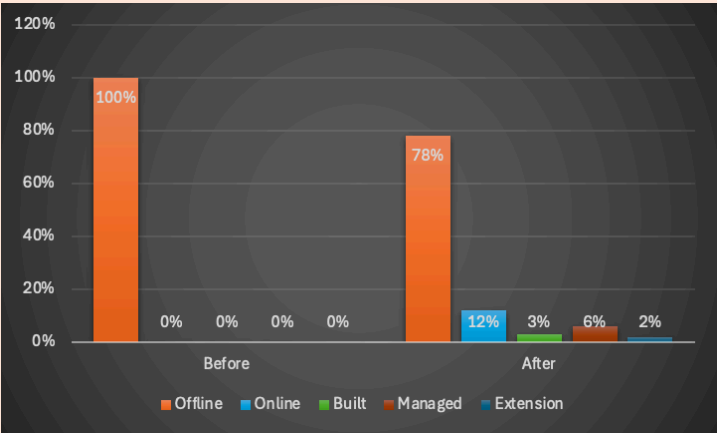
Growth transformation delivered through structured approach to profitability, analytics and execution rigor



249%

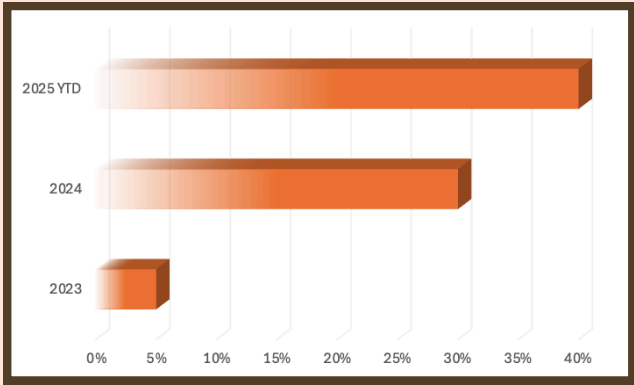
Y-o-Y Revenue Growth

New Business Lines



Shail Advisors added three new business lines for their client by repurposing existing capabilities—leveraging core team skills, optimizing costs, and designing adjacent revenue streams that enhanced profitability without additional investment. These 3 businesses contributed to 22% of their revenues. They will also further fuel their future growth

Referral Sales



Optimized the customer referral ecosystem to create a self-reinforcing loop of revenue growth & brand advocacy

Leadership Impact Beyond Revenue

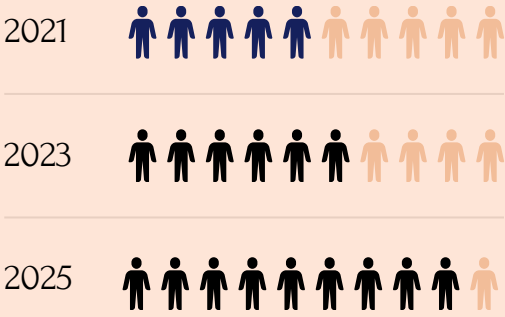
This engagement exemplifies our role as an Operating Partner in driving structural profitability, institutionalizing data-led execution and creating long-term enterprise value through operational excellence

- 40% improvement in gross margin through cost optimization
- 60% increase in customer lifetime value (LTV)
- 25% reduction in per unit operating costs via data-driven efficiency levers
- 7X improvement in decision-making velocity through analytics visibility
- Employee engagement up by 800%, attrition down by 90%
- Drove leadership mindset shift from reactive to data-led decisioning
- Built a culture of accountability and ownership through transparent metrics
- Built internal capabilities to sustain growth trajectory without ongoing external dependency.

SHAIL ADVISORS - PURPOSE→PROCESS→PERFORMANCE→PROFIT

1. Led the end-to-end business turnaround initiative, overseeing strategic design, execution governance, and capability building across teams
2. Founder Mindset Transformation:
 - a. Rewired the leadership approach from survival mode to scalable growth orientation.
 - b. Embedded forward-looking planning, accountability and data-led decision frameworks.
3. Data Analytics & Reporting Cadence:
 - a. Established structured dashboards, weekly performance reviews and monthly business reviews
 - b. Drove transparency, agility and proactive course correction across functions.
4. Revenue Optimization:
 - a. Deployed pricing analytics, unit economics tracking and product wise ROI assessment to unlock margin expansion and improve revenue quality.

Customer Retention & Upsell



By realigning pricing, program structures and customer experience, Shail Advisors engineered sustained renewal growth & significant uplift in LTV