Launch Cohort Data Request

Next Sage Group · November 2026

Welcome to the Launch Cohort

Thank you for joining the Launch Cohort. We are investing 20 hours of Growth Planning in your company at no charge and with no obligation. To do that well, we need a small set of numbers from your business.

This document explains what we ask you to share, what we ask you not to share, and how we protect what you send. Please read it, sign online at the link in the last section, and then send your data. Nothing is shared until the Mutual NDA you accepted on your application is in place.

What we need and why

We use your numbers to find your Growth Levers, the measures your Leadership Team can move that move revenue or profit. From them we build your Growth Plan and present it to your team.

The data comes from three places most companies already have: your CRM, your accounting system and your payroll or HR system. A spreadsheet export from each is fine. Go back as far as 24 months if you can; if you only have 12, send 12.

Please send your data only after you have signed this document, and within 5 business days of signing. After you sign, we will share a private Google Drive folder set up just for your company. Only you and the named people in your NDA can open it. We aim to present your Growth Plan within about 10 business days after we receive complete data. A Growth Plan is a planning tool. It is not a guarantee of any result.

What to send

#	Item	Where it usually lives	Notes
1	Lead metric	CRM	The number you watch at the top of your sales process (leads, booked calls or quotes sent), by day or week
2	Conversion rate	CRM	Share of leads that become clients
3	Daily revenue	Accounting	Totals by day
4	Daily expenses	Accounting	Totals by day
5	Clients gained	CRM or accounting	Count by month
6	Clients lost	CRM or accounting	Count by month
7	Employees and total cost	Payroll or HR	Headcount and total cost by month, as totals only
8	Monthly sales by salesperson	CRM	Use "Rep A", "Rep B" or initials if you prefer
9	Estimated hours to fulfill a sale	Your best estimate	A rough average is fine

If you do not track one of these, tell us. We will work with what you have.

What not to send

We only need totals and counts. Please do not send:

- Names of employees tied to pay or performance
- Personal information about your customers (names, addresses, emails, phone numbers)
- Social Security numbers, card numbers, bank account numbers, health information or any government ID numbers

If something like this appears in an export by mistake, tell us right away. We will delete it and ask you to resend a clean file.

How we protect your data

- Your data is covered by the Mutual NDA you accepted on your application.
- We store it in a separate Quickbase app that only the named people in your NDA can see.
- We use it only to build your Growth Plan and to support your company if you choose to continue with us.
- We do not sell it or share it with other companies in the Launch Cohort.
- If you decide not to move forward, we delete your data within 30 days of your decision.

Our Privacy Policy explains more about how we handle information.

What happens next

1. You sign this document.
2. You send your data to your private folder within 5 business days.
3. We check it and ask any questions.
4. We build your Growth Plan.
5. We present the Growth Plan to your Leadership Team.

After the presentation, you decide what is next. Help with a live dashboard and ongoing support are paid services, and only if you want them.

Acknowledgment and signature

By signing online, I confirm that:

- I am authorized to share this information on behalf of my company.
- I have read what Next Sage Group needs, what it asks me not to send, and how the data is protected.
- I understand the Growth Plan is a planning tool and not a guarantee of results.
- I understand my data will be deleted within 30 days if my company does not move forward.

Sign here: nextsagegroup.com/sign-data-request. Type your name, title and company, and tick "I AGREE." Typing your name is your electronic signature.

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