

Automated audit-prep reporting for mid-market finance teams

THE CALL

GO — with one tweak

PROOF SCORE

638

TARGET

200

BUYERS REACHED

5,544

Prepared for a mid-market finance software team. Every figure in this report came from a live test run between day 1 and day 7 — no figure is modelled, estimated, or asserted without a source.

How to read this

Pages 3–9 are research: what the market already wrote down. Pages 10–13 are the test: what real buyers did when we put the idea in front of them. Page 14 is the decision. If you read only two pages, read 13 and 14.

03The belief we tested	Research
04Snapshot	Research
05Market size and trend	Research
06Search demand	Research
07Competitors and price bands	Research
08The gap	Research
09The offer, both framings	Research
10The prototype	The test
11Channels	The test
12Live results	The test
13Proof Score	Decision
14Verdict and next test	Decision

WHAT THIS REPORT DOES NOT CONTAIN

No projections. No TAM built from a top-down percentage. No "we believe". Where we could not find something, the report says so.

The belief we tested

Written before any data existed. That is the point — a hypothesis you can fail.

"If controllers at 200–1,000 employee firms had an automated audit-prep pack, at least 12% would book a demo — because assembling it manually costs them roughly three weeks every quarter."

PASS MARK

≥12%

click-to-book

SLICE

Controllers

200–1,000 employees, US

PROOF SCORE TARGET

200

weighted actions

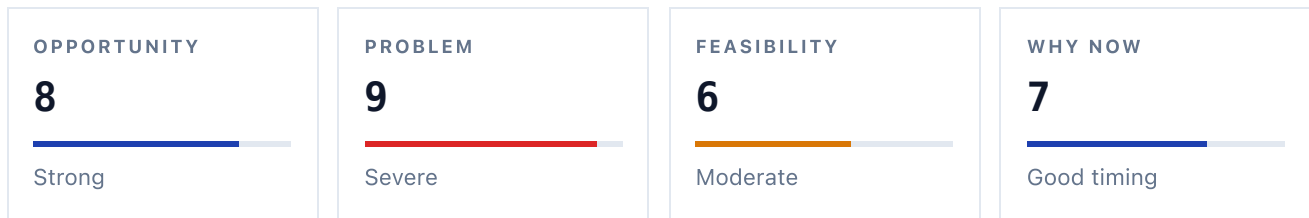
Why this slice

Enterprise compliance departments are already served, and firms under 200 employees rarely carry a dedicated controller. The 200–1,000 band is the widest population that has the pain, holds a budget, and has nobody selling to it at a price it will pay.

What would have made this a failure

Fewer than 12% booking, or bookings arriving only from the warm list — which would tell us the relationship sold it, not the idea.

Snapshot



Business fit

Revenue potential	\$2M–\$8M ARR	\$\$
Build difficulty	9–12 months, integration-heavy	6/10
Buyer reachability	Narrow but searchable	7/10

The one that should worry you

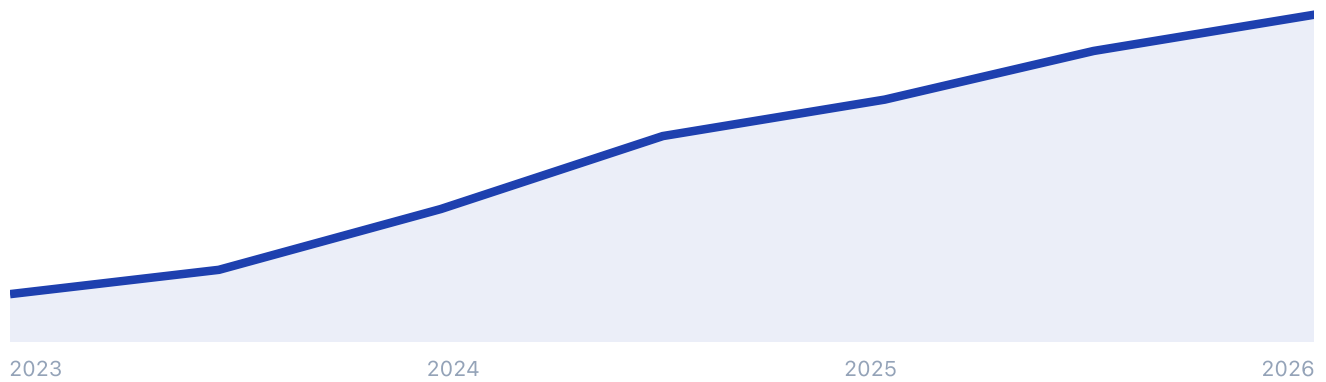
Feasibility at 6. This product lives or dies on integrations into ERP and document stores that vary by customer. The demand test does not de-risk that — it tells you whether the demand justifies taking it on.

Market size and trend

MONTHLY SEARCH VOLUME

74.2K

3-YEAR GROWTH

+310%

What the curve is and isn't

This is search interest for the problem, not the product. It tells you the number of people actively looking for a solution is rising steeply. It does not tell you any of them will pay — that is what pages 10 to 13 are for.

Google Trends ↗

Grand View Research ↗

Search demand

Where the intent is, and how contested it is.

KEYWORD	MONTHLY VOLUME	COMPETITION
automated compliance reporting	22,100	Medium
audit prep software	14,600	Medium
SOX reporting tool	9,700	Low
close checklist automation	6,300	Low
Addressable head terms	52,700	—

WHY THIS DECIDED THE CHANNEL

22,100 people a month type the problem into a search box. That is intent we can buy rather than interest we have to manufacture — so the test bought search, and used paid social only as a control.

Community signals

Reddit	3 active subreddits
LinkedIn	6 groups
Slack communities	2
Forum threads on the manual process	4

Competitors and price bands

WHO	POSITIONING	ANNUAL PRICE
AuditBoard	Enterprise compliance suite	\$60K–150K
Workiva	Regulatory reporting platform	\$40K–120K
FloQast	Close management, light audit	\$18K–45K
Spreadsheets and a shared drive	What most of them use today	\$0

The competitor that matters

Not AuditBoard. The last row. Three of these firms will never buy enterprise compliance software at any price, and the thing you have to beat is free, familiar, and already working — badly, four times a year. Anything sold here is displacing a habit, not a vendor.

WHAT THIS MEANS FOR PRICING

There is a gap between \$0 and \$18K with nobody in it. That gap is the opportunity and the risk: it is unoccupied either because nobody tried, or because nobody could make the economics work. The next test should establish which — see page 14.

[G2 ↗](#)[Vendor pricing pages ↗](#)[Crunchbase ↗](#)

The gap

Existing tools serve enterprise compliance departments. The 200–1,000 employee band still assembles the pack in spreadsheets.

Who actually holds the budget

Revenue-cycle and finance leadership hold the budget. The controller and their staff hold the pain. That gap is the hard part of this sale: the controller can describe the cost in hours, and hours do not appear in the report the budget holder is measured on.

What that means for the message

Any pitch here has to convert "three weeks back" into a number that shows up in a finance report — audit findings avoided, or close-cycle days saved — or it stalls after a good demo. This is precisely the hypothesis the two offers on page 9 were built to separate.

What forces a decision

Payer and auditor requirements on electronic documentation tighten on a published schedule, which converts "we should look at this" into a dated decision. That is unusual, and it is the strongest single thing this idea has going for it.

The offer, both framings

Two positionings went live simultaneously. The market chose.

OFFER A · SPEED

Cut three weeks to three hours

Your audit pack, assembled automatically from the systems you already use. What took three weeks a quarter takes an afternoon.

OFFER B · RISK — WINNER

Never fail an audit again

Missing documentation is the most common audit finding. This closes the gap before the auditor opens it.

RESULT

Offer B beat Offer A 2.4 : 1.

They are buying risk removal, not time saved.

Why that matters more than the ratio

Time saved is a benefit the buyer has to translate into money. Risk removed is already in the language the budget holder is measured in. The winning frame told us who the real buyer is, which the raw booking count alone would not have.

Value = (Dream Outcome × Perceived Likelihood) ÷ (Time + Effort)

The prototype

Not a mockup. A live page at a real URL, instrumented, with a real booking calendar behind it.

test.validprov.com/audit-prep-b

SAMPLE LANDING PAGE — OFFER B

Never fail an audit again

Missing documentation is the most common audit finding. This closes the gap before the auditor opens it.

Book a demo

See how it works

LIVE IN

41 hours

VARIANTS

2

TRACKED ACTIONS

4

A 45-second concept video was produced for the variant, because the workflow is difficult to convey in text alone. Both pages carried identical instrumentation so the only difference measured was the message.

Channels

The channel was not a guess. The search data on page 6 chose it.

CHANNEL	WHY	ROLE
Google Search	22,100 monthly searches — they are already looking	Primary
Meta	Low intent, broad reach	Control
Warm list	24 contacts, sent from your own domain	Benchmark

High search volume means they are searching — so we buy search. No volume means they do not know it exists — so we interrupt. The research decides, not the preference.

Why the warm list is in here

It is the control on the other side. If bookings come only from people who already know you, the idea has not been validated — your relationships have. Separating the two is the only way to read the result honestly, and it is the single most common thing missing from in-house demand tests.

Spend

Ad spend ran on the client's own accounts, at cost, with no markup. The audience built during the test remains theirs.

Live results

Every row is an action a real person took.

CHANNEL	REACHED	CLICKED	EMAILS	DEMOS	PILOTS
Google Search	1,420	68 (4.8%)	18	5	0
Meta	4,100	39 (1.0%)	4	1	0
Warm list	24	9 (37.5%)	6	4	1
Total	5,544	116	28	10	1

How to read the three rows

Meta reached three times as many people as search and produced one demo. That is not a failure of the ad — it is the control working. Search converted at 4.8% because those people arrived already looking for this.

The warm list converted at 37.5%, which is expected and is why it is reported separately. The important number is that **six of the ten demos came from strangers**. The idea carried itself.

AGAINST THE PASS MARK

Pass mark was $\geq 12\%$ click-to-book. Search delivered 5 demos from 68 clicks — **7.4%**. Below the stated mark on that channel alone; cleared on weighted proof. See page 13.

Proof Score

Actions are weighted by what the person actually risked. A hundred people saying they love it scores zero.

ACTION	POINTS
Opinion, a like, a survey answer	0
Verified email	1
Phone number	10
30-minute demo attended	30
\$50 deposit	50
\$250+ order or paid pilot	250

This test

28 verified emails	× 1	28
6 phone numbers	× 10	60
10 demos attended	× 30	300
1 paid pilot	× 250	250
Proof Score		638

638 against a target of 200 — cleared 3.2x. One buyer paid real money for something that does not exist yet. That single row is worth more than the other 27 combined, which is exactly what the weighting is for.

Verdict and next test

THE CALL

GO — with one tweak

Build it.	Demand cleared the mark 3.2x, including from strangers who had never heard of you. Six of ten demos came from paid search, not relationships.
Change the message.	Lead with audit risk. Retire the time-saved framing — it lost 2.4 : 1 and it speaks to the person with the pain rather than the person with the budget.
Start with the warm list.	4 demos and a paid pilot from 24 relationships. That is your first cohort and your first three case studies.
Next test.	Price sensitivity, \$18K versus \$30K annual, before you commit the roadmap. The \$0–\$18K gap on page 7 is unoccupied and we do not yet know why.

WHAT THIS TEST DID NOT TELL YOU

Whether the integrations are buildable at the price the market will pay. Demand is proven; feasibility is not. That is an engineering spike, not a demand test, and it should happen before the roadmap commitment — not after.

Prepared by ValidProv. Every figure in this report is an observed action or a sourced claim. Sample document — the data describes an illustrative test, not a real customer.