360LEADERS

ORGANISATIONAL DATA INSIGHTS:

BETA ACCESS

Overview April 2023 The Data Insights Platform identifies and anticipates organisational challenges, and shares best practice solutions. Findings are summarised in a 10 page report.



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Overview of Organisational Assessment and Prioritised Actions

OVERVIEW		~~
	APPROACH	High Growth Co
360Leaders took a hypothesis led ar for High Growth Co.	ad action orientated approach to minimise	e effort and maximise impact
		PRIORITSED ACTIONS
Employee List Employee Survey Strategy	Organisational Industry Value Drivers Benchmarks	Organisational Assessment Strategy
	ORGANISATIONAL ASSESSMEN	IT
High Growth Co's organisation has b industry benchmarks.	een assessed on a set of critical organisat	tional value drivers against
	SCORECARD	
OVERALL ORGANISATION SCORE	ORGANISATIONAL VALUE DRIVERS	
Inline Overall Organisation Score is inline with the benchmark. Key: Score relative to benchmark	STRATEGY Strategy setting, tecon algometric quality DesiGN Org structure, responsibilities, and forecast org growth	EFFECTIVENESS Leadership behaviour, ways of working, inclusion and caldiadration
Above 🛑 Inline 🛑 Below		
STRENGTHS	OPPORTUNIT	IES
1 Leadership Team Size: Optimal	1 Product Team: Su	b-optimal delivery – critical to success
2 Team Roles: Clear	Individual Roles: 1	Unclear – FTE growth will make worse
FTE and Employee Cost Forecasts: Ac		Teams: Over centralised
Leadership Behaviours: Effective	Strategy Alignmen	
G Leadership Team Experience: High	Employee Engage	ment: Low – driving turnover
	PRIORITISED ACTIONS	
Five actions have been prioritised ba	ased on High Growth Co's organisational a	ssessment and strategy.
1 Increase focus on Product		
2 Clarify and optimise indiv	idual roles	
3 Consider moving me	pre Marketing and Ops activities to local ma	arkets
	er team behind the strategy	
	a plan to boost employee engagement	
	RGANISATIONAL STRATEGY 360LEADERS.	COM PAGE 1



escription of each of the anisational assessment	e five prioritise			PRIORITISED ACTIONS					
				tisation – linked to High Growth Co's					
ACTION	DESCRIPT	ION		RATIONALE					
Increase focus on Product	Team focus.	Enhance th	inology to increase Leadership re product roadmap o support effective international	Product is critical to delivering the strategy, however not a standalone function (see 24). The product roadmap development process is critical to successfi international expansion yet is not working well today this is not understood by the Product team (see 31).					
Clarify and optimise individual roles	Clarify individual roles and responsibilities to boost productivity. While doing so, seek to selectively increase role specialisation to support forecast growth.		ig so, seek to selectively	Individual roles and responsibilities are unclear today (see 2C). This will be excerbated if the number of FT grows as expected (see 2C). The team is currently les specilaised than the benchmark (see 2C).					
Consider moving more Marketing and Ops activities to local markets	Review the ro Marketing an	Review the role of the Group versus local markets for Marketing and Operations.		While the role of Group and local teams is clear, it is potentially sub-optimal in Marketing and Ops where activities are centralised yet there is a high degree of local variation in needs / optimal execution (see 20). Particular issue given planned geographic expansion.					
Align the wider team behind the strategy	(beyond the L	Explore mechanisms to boost the wider team's (beyond the Leadership Team) understanding of High Growth Co's strategy.		The Leadership Team is aligned on High Growth Co's strategy, however there is a lack of alignment across the wider organisation (see 10). This drives lower engagement (see 10) objective quality (see 10) and decision making (see 30).					
Develop a plan to	Review the drivers of below benchmark engagement results, with a focus on critical functions (e.g., Product). Develop and implement a plan to boost engagement.								
boost employee engagement	results, with a Develop and	a focus on implement	critical functions (e.g., Product).	team (see 43). However, team engagement is low (se 49), and a appears to be a driver of higher than average employee turnover (see 40).					
boost employee engagement n Growth Co's organisat assessment underpins	results, with a Develop and ORGA tion has been s the Prioritise SCOR	NISAT assessed action	critical functions (e.g., Product), t a plan to boost engagement. IONAL ASSESSME! d on a set of critical organisa s' above. Details behind eacl	tion to the the second					
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Organisational Assessment deep dive, including data analytics and benchmarks

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st Practice: Teams with more functional and industry exp nployees today and growth potential to meet the organisa	perience tend to outperform. A balance between high perf tion's future needs supports long term outperformance.
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Team function and industry experience	Manager assessment of individual performance and growth potential
Function Experience (years)	
20	Gaps Today Optimal
15 10	
	Growth Potential Talent Issues Gaps in Future
	No 5% 40%
0 5 10 15 20	
Industry Experience (years)	No Yes Performing Today
Key: High Growth Co: All Leadership Team Individual Employee Benchmark: All Leadership Team	
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The platform can test, and deepen understanding of, specific organisational pain points

Example Context and Pain Points

Context:

- Cost Cutter Co expanded aggressively over 2021/22 in anticipation of future growth
- The market environment has slowed growth, creating a **need to cut costs**
- To extend runway, 30% of employees have recently been let go and the team has been reorganised

Pain Points to Explore:

- 1. Roles and Responsibilities: unclear in the new organisational structure for individuals and teams
- 2. Engagement: pockets of the organisation are now disengaged
- 3. Turnover: risk of regrettable turnover increased
- 4. Further Cuts: if further cuts are required, they could be made without materially impacting current or future performance

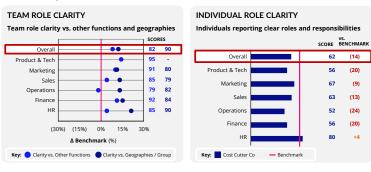
Testing the Pain Points with the Organisational Assessment

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Accept Another lob

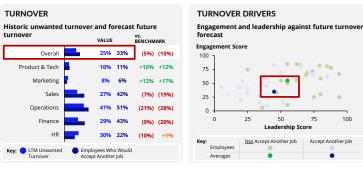
1. Roles and Responsibilities

Team roles are clear, however individual roles are not clear across all teams apart from HR



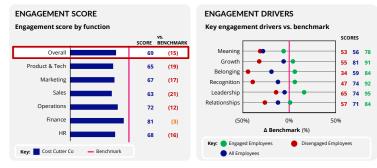
3. Turnover

Turnover is expected to increase, driven by engagement; particularly in Operations, Finance and Sales



2. Engagement

Engagement is low across all teams; some drivers (e.g., Belonging, Recognition) may be linked to layoffs



4. Further Cuts

20% of employees not performing today nor have potential to perform in future; suggests scope for further cuts

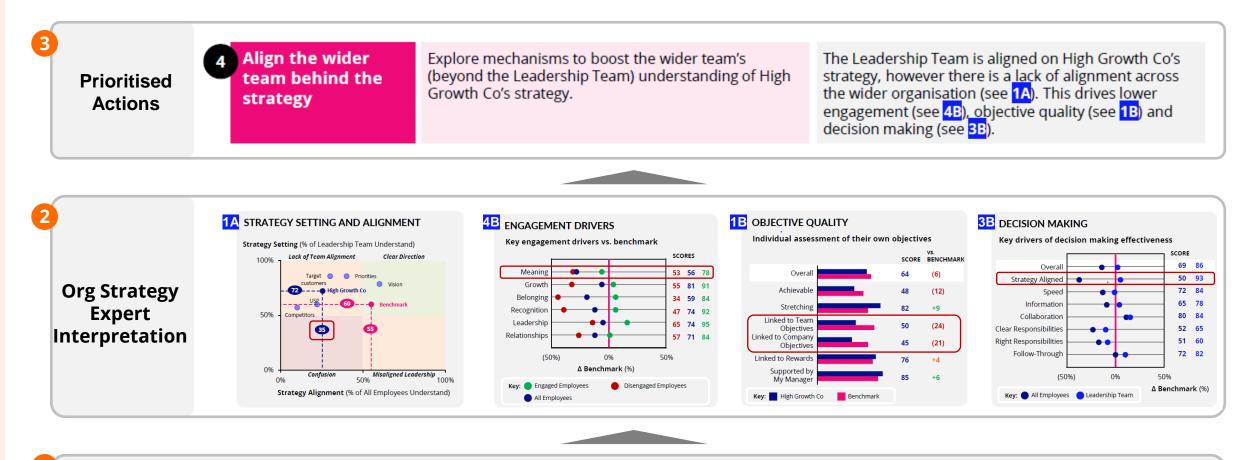
EXPERIENCE MANAGER ASSESSMENT Team function and industry experience Manager assessment of individual performance today and growth notential Function Experience (years 10 Growth Potential Experience (years





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Testing of specific pain points is supplemented with organisational strategy expert **360** interpretation of the Organisational Assessment to inform Prioritised Actions



Data Analytics using information gathered from an employee survey and employee list to create an Organisational Assessment

The Organisational Assessment is based on data gathered through an employee survey and employee list



Example: 1A. Strategy

1. Data Gathering

Employee Survey Question on Strategy Setting and Alignment:

To what extent do you agree with the below (strongly disagree to strongly agree scale):

- I understand High Growth Co's long term vision
- It is clearly defined who High Growth Co's target customers are
- There is alignment on how we will grow over the next 3 years
- Our top priorities as a firm are clearly defined
- We have a good understanding of our competitors and their strategies

Short set of objective questions used to determine if the Leadership Team has set a clear strategy and if it is understood by the wider organisation



High Growth Co

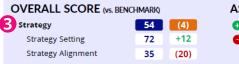
1 DIRECTION

A. STRATEGY

Best Practice: A fact-based strategy is set by the Leadership Team, considering a range of critical factors. To set direction and ensure alignment, the strategy is communicated to and understood by the wider organisation.

STRATEGY SETTING AND ALIGNMENT







ASSESSMENT SUMMARY

High Growth Co's Leadership Team is aligned on strategy
 Wider team has a poor understanding of strategy, particularly on Competitors and USP

Strategy Setting is based on Leadership Team responses

- Strategy Alignment is based on the responses of all employees
- 3 Overall scores are based on the average responses across questions

Interpretation of the scores can be aided by pressure testing understanding of the sources of growth and competitive advantage

Your FREE beta access... ... and option to access ongoing reviews

Getting Started

We're happy to provide you with free beta access to the platform!

Ongoing Reviews

Once we launch commercially later in 2023 – you'll have the option to conduct further periodic reviews:

Start-Up	Scale-Up	Enterprise	
<25 employees	25-250 employees	250+ employees	
£2,000	£5,000	£10,000	

Price covers one review. No commitment for future reviews.

We'd recommend a review every 6-12 months.

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How to get started...

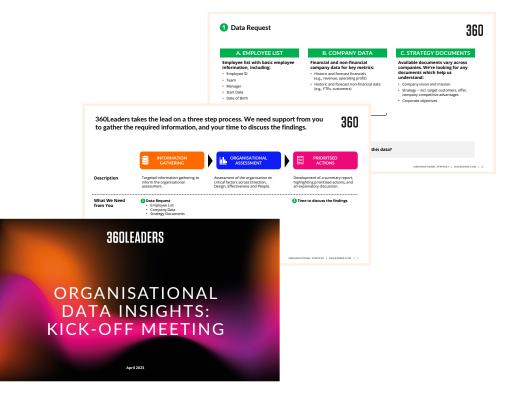
Option 1: Self-Serve Through the Platform

Enter company details and upload the requested information directly into our secure platform

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Download an example report Understand more on the platform and h	w it works	Employee Survey
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Company name		Browse Files Drag and drap files here
		or add a list of emails below:
		When would you like 360Leaders to invite your employees to complete the survey?*
		Would you like to speak to a 360 leaders seam member before we share the survey with your employees? *
		Vec pleasel

Option 2: Arrange a Kick-Off Meeting

If you'd prefer more support and guidance – we can arrange a kick-off meeting to discuss the data request



APPENDIX

Context and Pain Points

Context:

- Profit Focus Co has focused purely on growth for the last 5 years
- To boost its valuation ahead of the next funding round, and to make growth more sustainable, growth is now being balanced with profitability
- One of the levers available to achieve this is to increase org efficiency and effectiveness

Pain Points to Explore:

- **1. Decision Making:** inefficient, wasting time and leading to bad outcomes
- **2. Leadership:** ineffective, leading to poor productivity in teams
- **3. Individual Roles:** not optimally specialised to boost efficiency
- **4. Headcount Costs**: FTEs and headcount costs are too high, creating an opportunity to reduce headcount cost margin with future growth

Testing the Pain Points with the Org Assessment

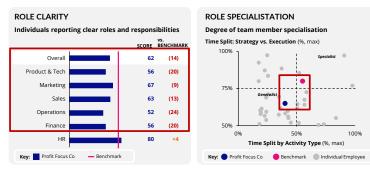
1. Decision Making

Quality of decision making is poor; driven by a lack of strategic alignment and of clear responsibilities



3. Individual Roles

Individual roles are unclear and there is opportunity to increase specialisation as the company grows



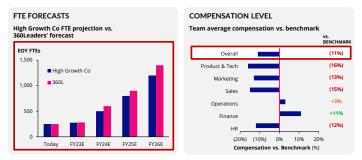
2. Leadership

Profit Focus Co's leaders perform in line with benchmark; opportunity to improve in Product & Tech and Operations



4. Headcount Costs

FTE number and growth is above benchmark given the business plan; however total compensation is below benchmark



Testing Specific Pain Points – Example: Intl Expansion Co

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Context and Pain Points

Context:

- Intl Expansion Co has grown rapidly in its home market over the last 3 years
- To maintain growth Intl Expansion Co has entered 4 new European markets in the last 12 months
- Over the **next 2 years**, the firm is looking to expand into a further 3 European markets and the US

Pain Points to Explore:

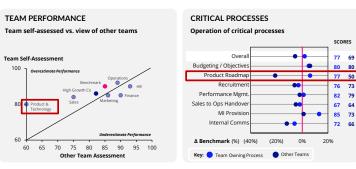
- 1. Product Roadmap: the product roadmap does not effectively balance the commercial needs of all markets
- 2. **Team Roles:** the role of different teams is unclear, and may not be optimised across HQ vs. local teams
- 3. Ways of Working: geographic complexity has reduced efficiency and effectiveness of decision making
- 4. Objective Setting: objectives are unclear in areas, and not aligned across teams and individuals

Testing the Pain Points with the Org Assessment

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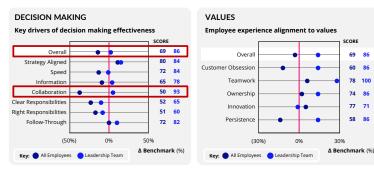
1. Product Roadmap

Other teams report material issues with the performance of the Product & Technology function and Product Roadmap process



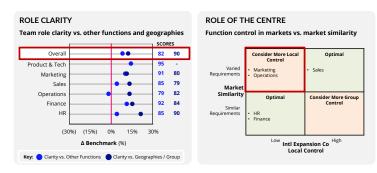
3. Ways of Working

Overall decision making score is below benchmark, driven by worse than average collaboration



2. Team Roles

Team roles are clear across geographies; however there is potential to optimisie the role of the centre in Marketing and Ops



4. Objective Setting

Some teams lack objectives; there is an opportunity to tighten the linkage between company, team and individual objectives



Organisational Assessment Analysis – Example: 3B. Decision Making

1. Data Gathering

Employee Survey Question on Decision Making:

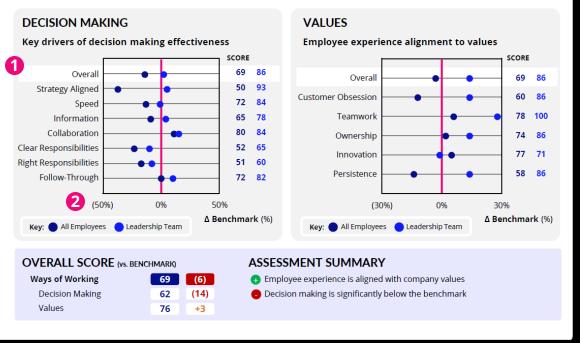
To what extent do you agree with the below (strongly disagree to strongly agree scale):

- At High Growth Co we make decisions which are aligned with our strategy
- Decisions are made in a timely manner
- Data and management information is used in decision making
- Teams and individuals are engaged across High Growth Co before decisions are made where appropriate
- It is clear who is responsible for making decisions
- Decision making responsibilities are appropriate given roles, knowledge and experience
- Once a decision has been made it is implemented without being revisited

2. Organisational Assessment

B. WAYS OF WORKING

Best Practice: Strategy is effectively executed through decisions made across the organisation. Organisational values shape day to day working norms, and help guide strategic execution.

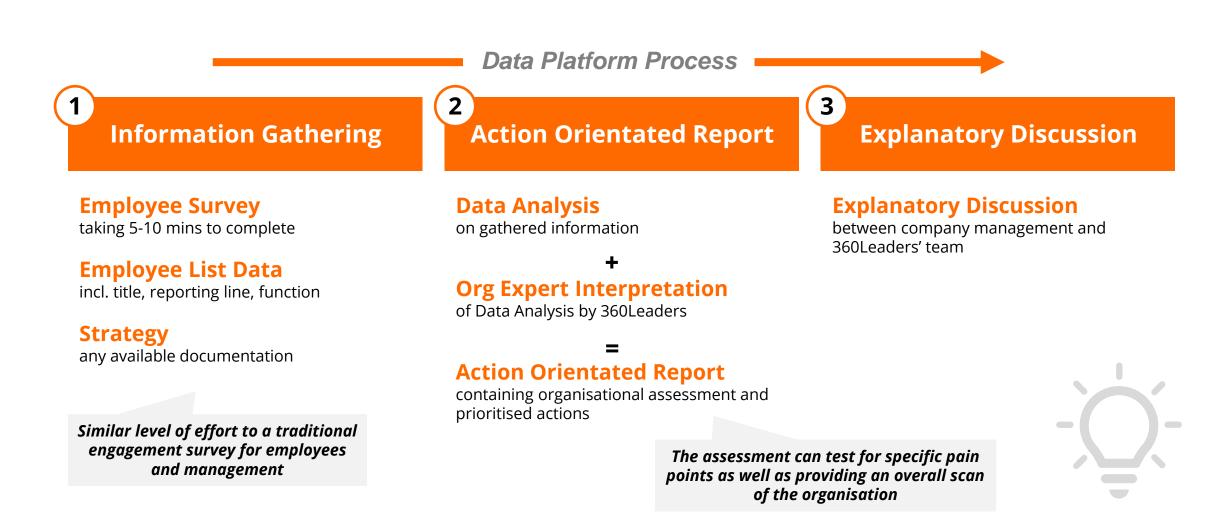


Overall decision making score derived from survey responses

Actions to improve decision making can be developed based on detailed analysis of (i) drivers of decision making score, (ii) differences across decision making behaviours of the Leadership team vs. the rest of the team, and (iii) understanding where the biggest gaps are to peers

Data Platform Process





What the platform does... (and what it does not!)

What the Platform Does

- 1. Takes a data-led approach to understand org setup and performance relative to peers across critical organisational areas (see right hand side of slide)
- 2. Applies an org strategy expert overlay to identify patterns, strengths, opportunities and actions
- 3. Tests specific ingoing pain points based on the company's situation and management concerns
- 4. Prioritises actions to consider in the context of management team experience

What the Platform Does

Conduct a comprehensive organisational assessment, including:

- Structured management team interviews
- Management assessments (e.g. Hogan)
- Detailed document review of team plans, objectives, processes and systems

Identify definitive actions to implement based on comprehensive assessment and workshops to pressure test and refine with the management team

A Selection of 360Leaders Organisational Strategy Case Studies

	Company	Challenge	Scope of Recommendations	Impact
Series D	S2B travel management platform	Defining the roles and capabilities needed to enter a phase of hypergrowth after a \$160m Series D raise	 How executive team roles evolve in the next phase of growth How to transition ways of working for hypergrowth How to improve the budgeting process to define strategic objectives and link to communications 	"l expected the final report to contain some helpful ideas, but instead I found there was an interesting insight on every page" Avi Meir, CEO & Co-Founder
Series D	Wine marketplace	How to set up the company to enter new markets, grow in existing markets and improve the recommendations engine following a \$155m series D round	 How to set up Product to deliver in a more complex and geographically diverse company Suggestions around the role of Group functions and their relationships with local teams Proposed structure and processes to create clarity on roles, responsibilities and objectives globally 	"We were very happy with the work 360Leaders did with our management team, all during a critical time for our business with a lot of moving parts" Heini Zachariassen, Founder
Series C	Digital veterinary platform	Defining how the organisation should evolve to effectively enter new markets , establish new distribution channels and launch new products	 Incorporation of new channels and product lines into the organisation and evolution over time Role of Group functions vs. local teams Organisational setup to enable and encourage long-term decision making based on data 	"360Leaders' rigorous and independent analysis helped us make tough decisions for the future and accelerated delivery of our ambitious strategy" Per Victor, Chairman & Co-Founder
Public	OTOVO Residential solar energy platform	After launching in 7 markets, how to transition from startup to scaleup and create Group efficiencies	 How to update market reporting lines to reflect maturity and needs Suggestions to create greater clarity and efficiency around Group vs. Local decision rights How to improve the OKR-setting process to have a greater impact 	"360Leaders' work aligned with a strategy refresh and was a good opportunity to reflect on what's worked well to-date and what we need to adapt in this next phase" Andreas Thorsheim, CEO & Co-Founder
Series B	simple feast Plant-based mealkits	Defining the organisational structure and team needed to effectively manage operations across two very different markets	 How to create a consistent org structure across markets to maximise CEO effectiveness How to improve the OKR-setting process to have a greater impact Suggestions for defining roles and cross-functional processes 	"This work was very helpful as we enter our next stage of growth and was a great opportunity to think deeply about our organisational structure" Jakob Jønck, CEO & Co-Founder

360Leaders' Organisational Strategy team contains deep organisational strategy expertise



Rupert Lion – Managing Director

Rupert is a seasoned talent and organisation advisor, executive headhunter and strategist. He has a passion for people and culture, and their impact on company success. He has worked closely with a range of VCs and businesses from Series A/B to corporates. Rupert has 20 years of experience in the TMT industry, previously working as a Strategy Consultant and Equity Analyst at top tier firms such as Deloitte, OC&C Strategy Consultants, Bell Labs and Morgan Stanley.

Subsequently, he was a Director at The Up Group, the digital and technology-focused global Executive Search firm where he led the Northern Europe region with particular focus on the Nordics, Netherlands, DACH, as well as the UK. Rupert holds an MA in Experimental Psychology from Oxford University and is a Chartered Accountant.



Dan Sheen – Partner, Org Strategy

Dan joined 360Leaders in 2021 and is a Partner in our London office. He leads our Data Insights Platform offer. Dan brings over 12 years of experience in organisational strategy and transformation.

Prior to 360Leaders, Dan was on the management team at Humatica, where he focused on organisational strategy projects for PE portfolio companies. Dan started his career as a strategy consultant at Marakon, advising PLCs on their corporate and business unit strategies. Dan holds an MA in Economics from the University of Cambridge.



Kate Bhagwat – Principal, Org Strategy

Kate is an experienced organisational effectiveness and strategy consultant who has worked with technology scaleups across Europe and the US. Prior to 360Leaders, Kate worked as a People Strategy Manager at Deliveroo, leading projects in org design, employee engagement, and org effectiveness.

Kate began her career at Deloitte Consulting where she spent 5 years working on strategic planning projects for technology companies, government leaders, and non-profits. Kate holds an MBA from Harvard Business School and is an accredited Hogan Psychometric Practitioner.

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