

360LEADERS

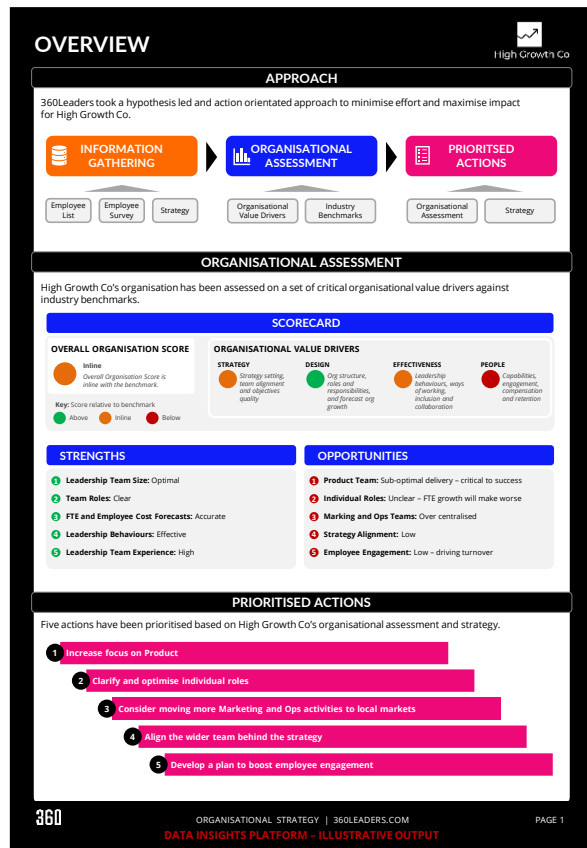
**ORGANISATIONAL DATA INSIGHTS:
BETA ACCESS**

Overview
April 2023

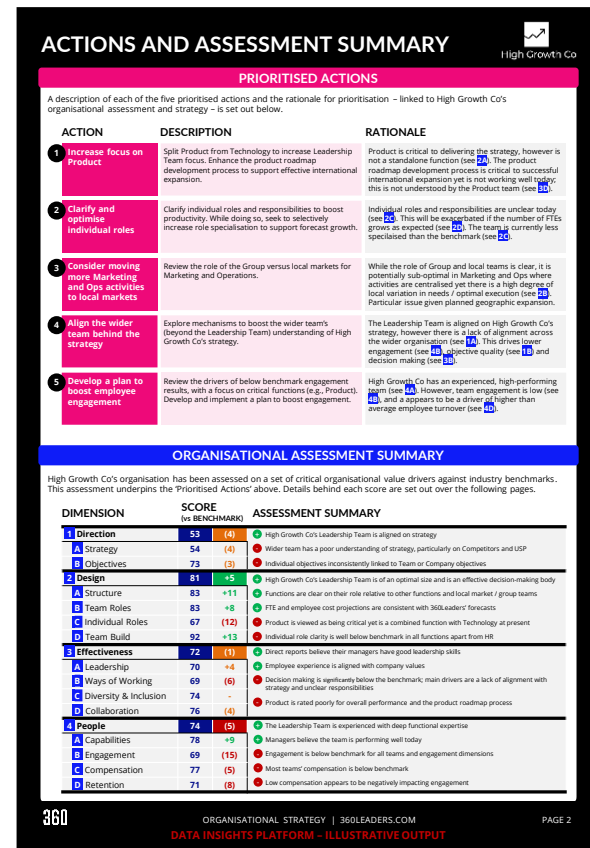
The Data Insights Platform identifies and anticipates organisational challenges, and shares best practice solutions. Findings are summarised in a 10 page report.

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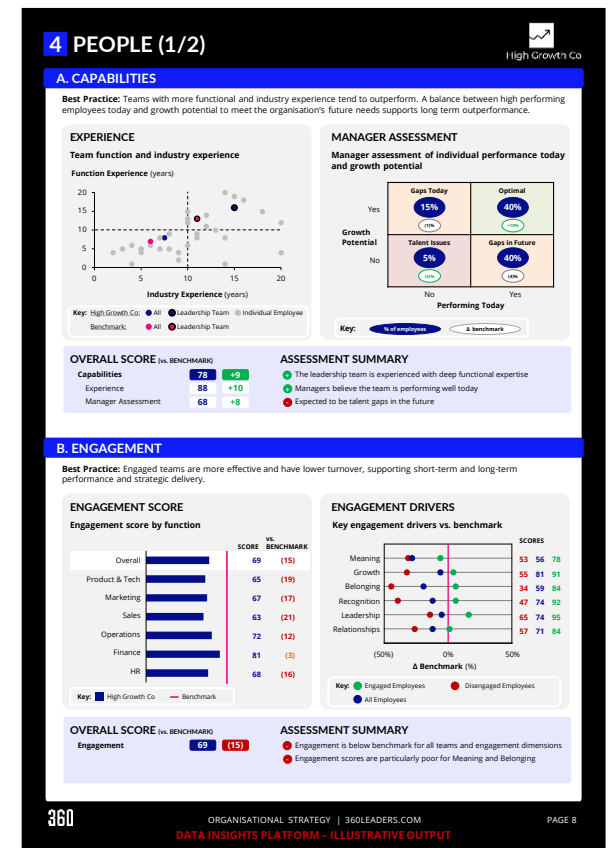
1 Overview of Organisational Assessment and Prioritised Actions



2 Elaboration on Prioritised Actions and all dimensions of the Organisational Assessment



3 Organisational Assessment deep dive, including data analytics and benchmarks



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**

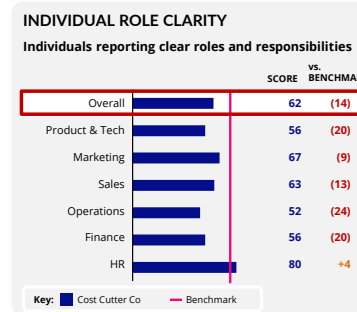
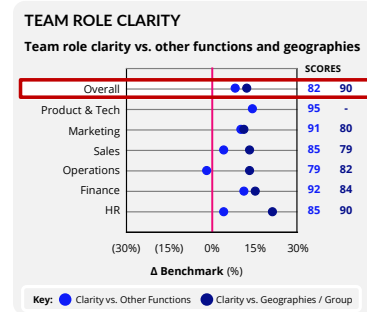
Pain Points to Explore:

- 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

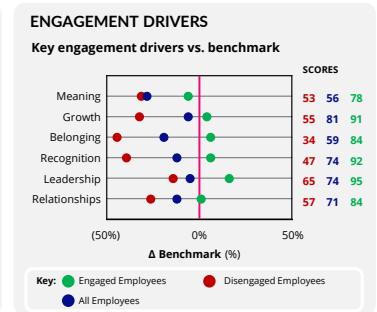
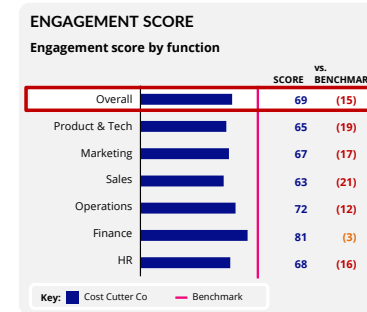
1. Roles and Responsibilities

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



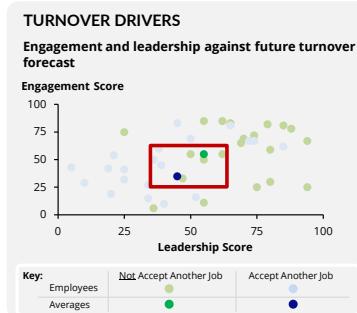
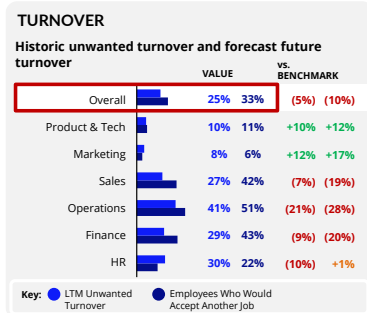
2. Engagement

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



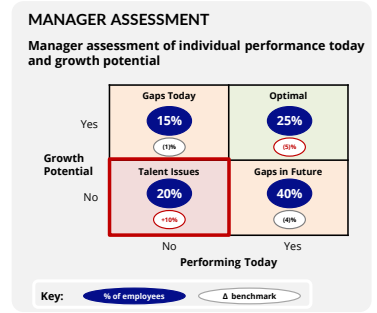
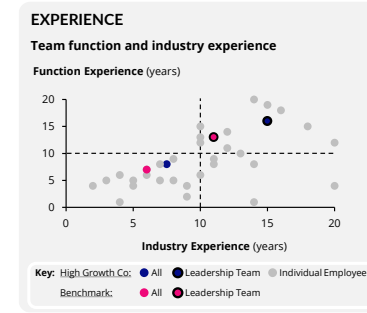
3. Turnover

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



4. Further Cuts

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



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

3

Prioritised Actions

4

Align the wider team behind the strategy

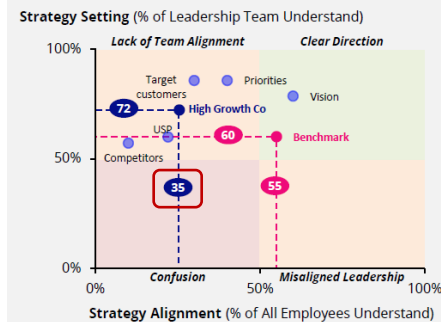
Explore mechanisms to boost the wider team's (beyond the Leadership Team) understanding of High Growth Co's strategy.

The Leadership Team is aligned on High Growth Co's strategy, however there is a lack of alignment across the wider organisation (see 1A). This drives lower engagement (see 4B), objective quality (see 1B) and decision making (see 3B).

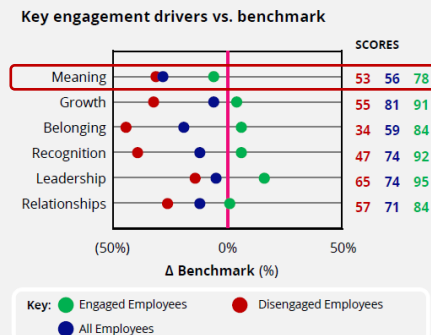
2

Org Strategy Expert Interpretation

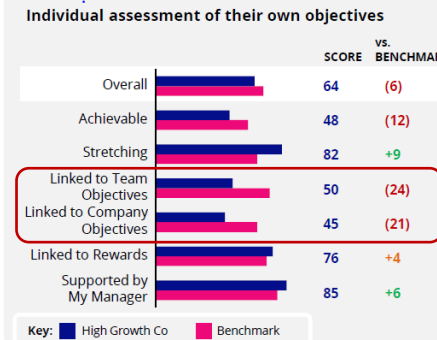
1A STRATEGY SETTING AND ALIGNMENT



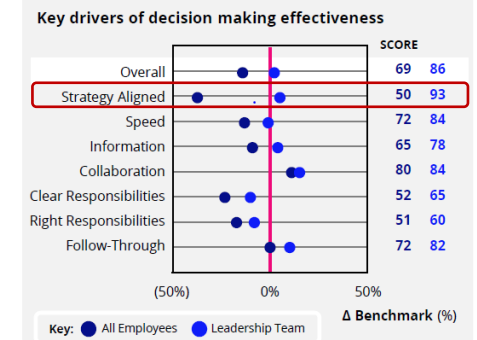
4B ENGAGEMENT DRIVERS



1B OBJECTIVE QUALITY



3B DECISION MAKING



1

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

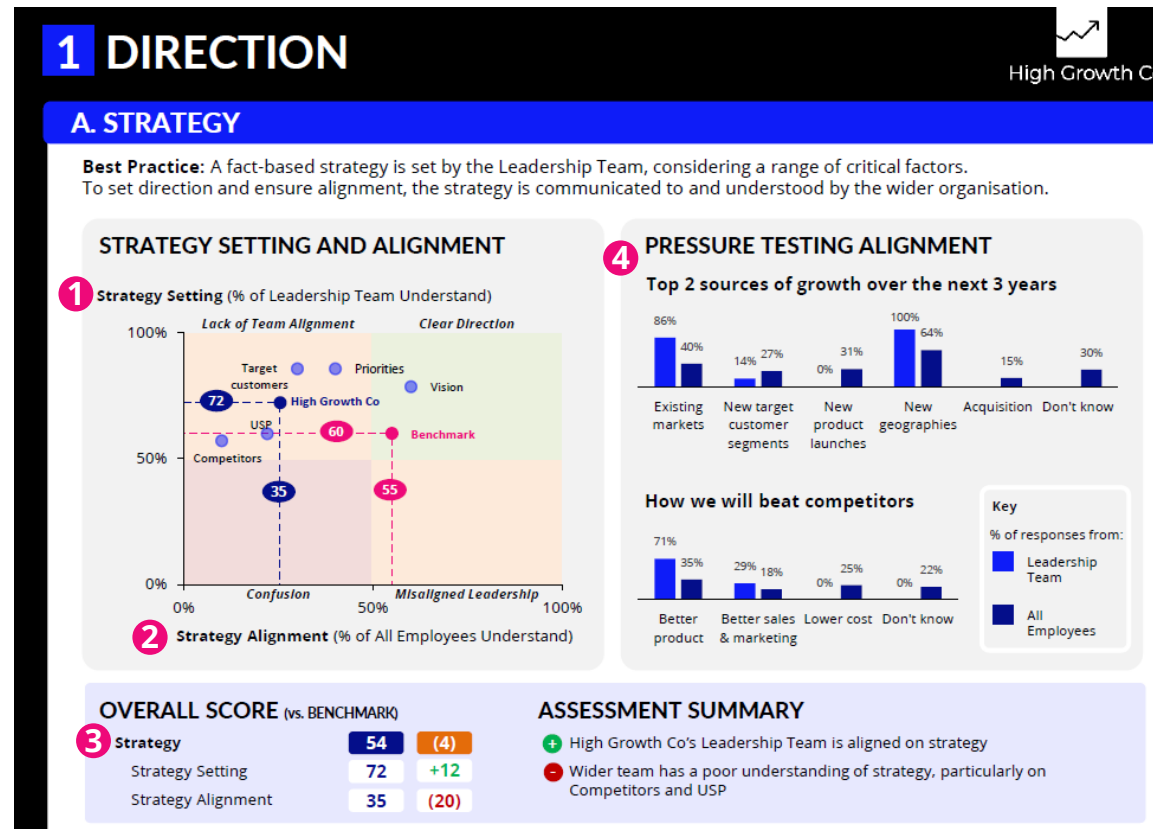
Employee Survey Question on Strategy Setting and Alignment:

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

2. Organisational Assessment



- Strategy Setting is based on Leadership Team responses
- Strategy Alignment is based on the responses of all employees
- 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.

How to get started...

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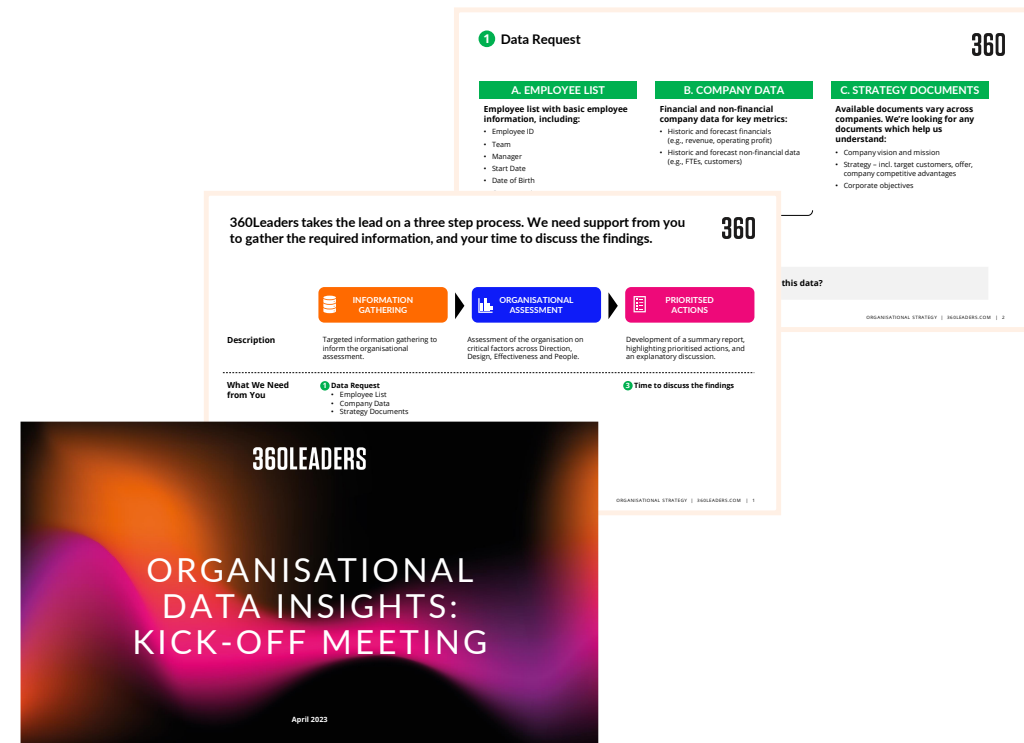
Option 1: Self-Serve Through the Platform

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

The screenshot shows two overlapping web forms. The top form is the registration page, titled "Organisational Data Insights Platform". It includes a "Thanks for your interest" message, a "Complete this form to get started" instruction, and a "Wants more information?" section with links to the platform website, a partner review, and a how-it-works page. The "About You" section contains fields for "Your name" (with first and last name sub-fields), "Your email address", and "Company name". The bottom form is the "Employee Survey" setup page. It explains that the survey takes 5-10 minutes and includes questions on strategy, objectives, roles, and responsibilities. It asks for email addresses of employees to be surveyed and provides a "Browse Files" button for uploading spreadsheets. It also includes a date selector for when to invite employees and a checkbox for whether to speak to a 360Leaders team member before starting the survey.

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

Testing Specific Pain Points – Example: Profit Focus Co

Context and Pain Points Testing the Pain Points with the Org Assessment

Context:

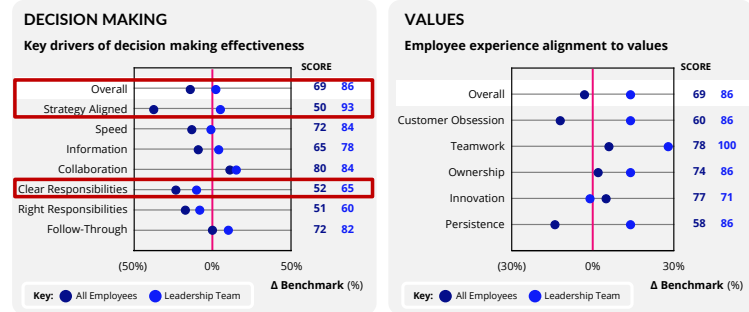
- Profit Focus Co has **focused purely on growth** for the last 5 years
- To boost its valuation ahead of the next funding round, and to make growth more sustainable, **growth is now being balanced with profitability**
- One of the levers available** to achieve this is to increase **org efficiency and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

Pain Points to Explore:

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

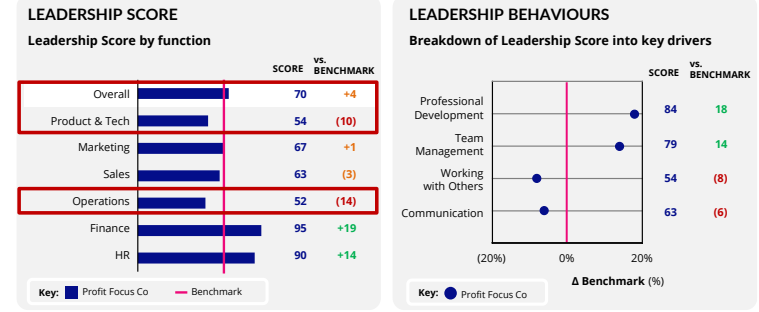
1. Decision Making

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



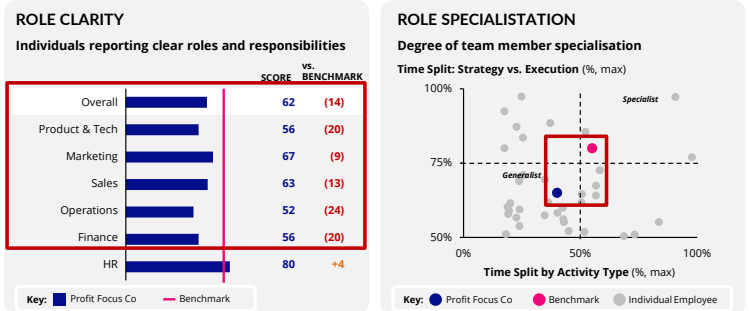
2. Leadership

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



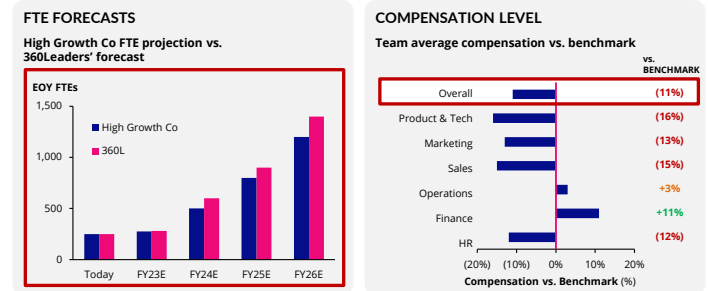
3. Individual Roles

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



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

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**

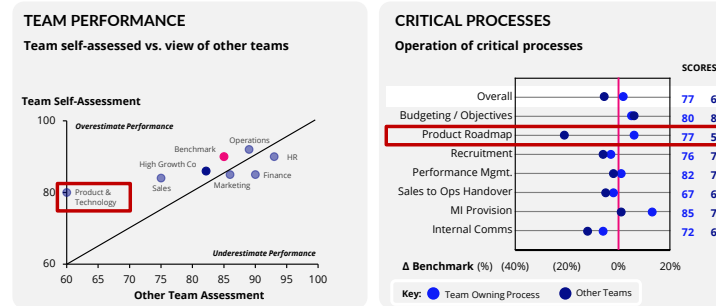
Pain Points to Explore:

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

Testing the Pain Points with the Org Assessment

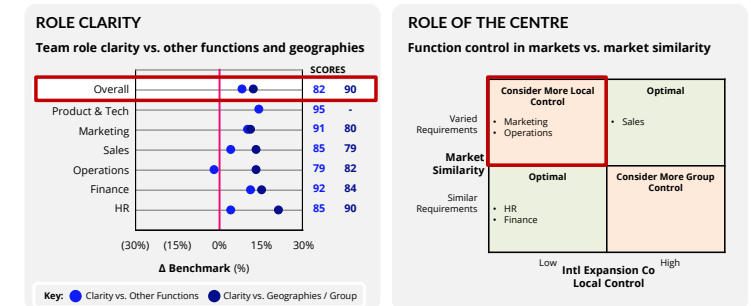
1. Product Roadmap

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



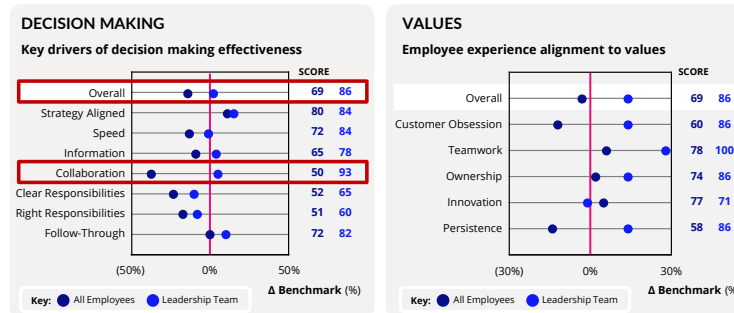
2. Team Roles

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



3. Ways of Working

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



4. Objective Setting

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



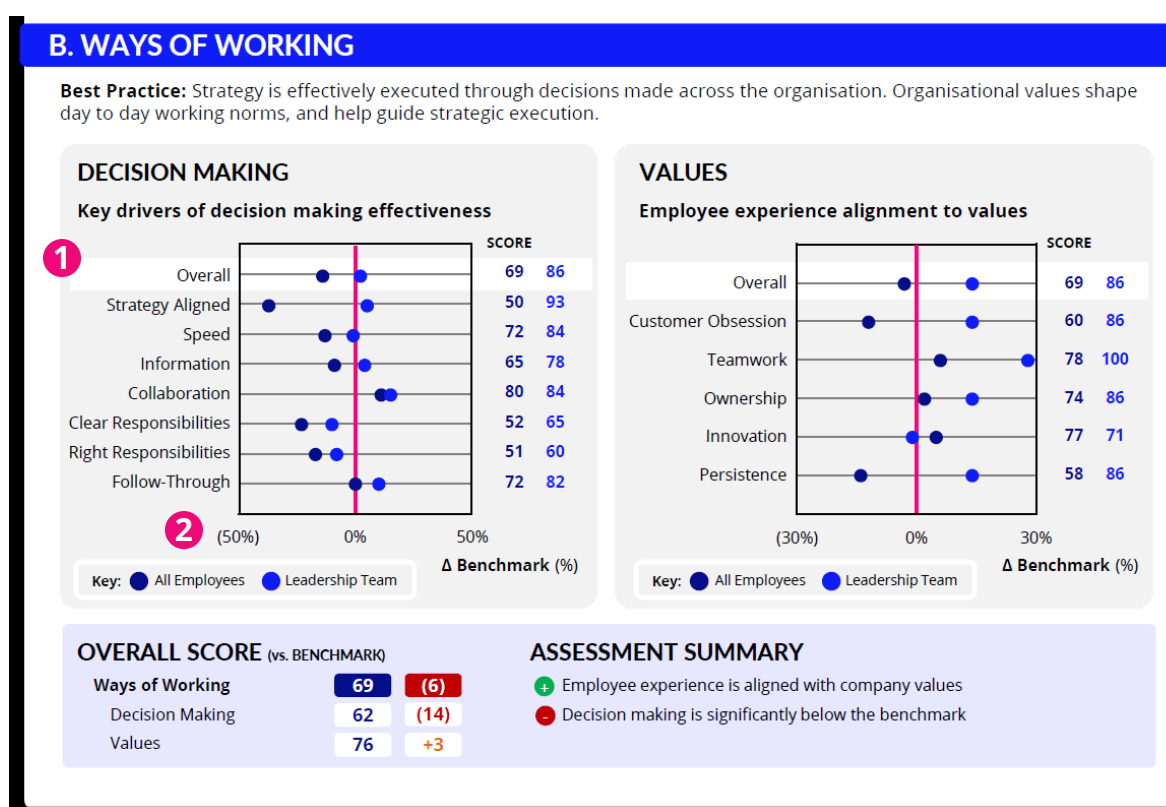
1. Data Gathering

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

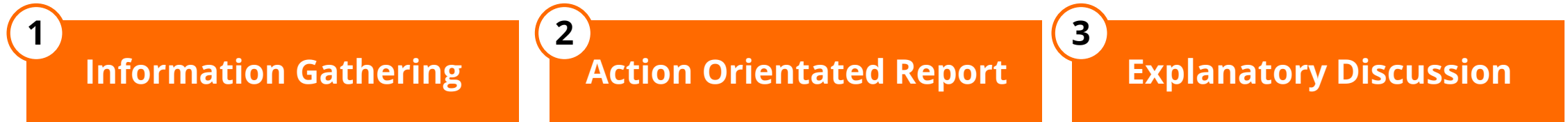
2. Organisational Assessment



1 Overall decision making score derived from survey responses

2 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



1
Information Gathering

Employee Survey
taking 5-10 mins to complete

Employee List Data
incl. title, reporting line, function

Strategy
any available documentation

Similar level of effort to a traditional engagement survey for employees and management

2
Action Orientated Report

Data Analysis
on gathered information

+

Org Expert Interpretation
of Data Analysis by 360Leaders

=

Action Orientated Report
containing organisational assessment and prioritised actions

The assessment can test for specific pain points as well as providing an overall scan of the organisation

3
Explanatory Discussion

Explanatory Discussion
between company management and 360Leaders' team



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

360

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

360

| | Company | Challenge | Scope of Recommendations | Impact |
|----------|---|--|---|--|
| Series D |  B2B travel management platform | Defining the roles and capabilities needed to enter a phase of hypergrowth after a \$160m Series D raise | <ul style="list-style-type: none"> • 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 | “I 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 | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 |  Residential solar energy platform | After launching in 7 markets, how to transition from startup to scaleup and create Group efficiencies | <ul style="list-style-type: none"> • 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 |  Plant-based mealkits | Defining the organisational structure and team needed to effectively manage operations across two very different markets | <ul style="list-style-type: none"> • 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

360



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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