

## Themes, Top 3 Issues, External Speakers, Team Events, & Playbooks by Qtr



The guiding themes for the staff, which we set upfront in April, 2016.

| Year | Annual Themes                                  | Quarterly Themes  |
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| 2016 | Execution With Repeatability                   | <ul style="list-style-type: none"> <li>Setting the HighBar</li> <li><a href="#">Leadership</a></li> <li><a href="#">Profitable Revenue</a></li> <li><a href="#">Business Metrics</a></li> </ul>                                 |
| 2017 | Market Leadership With Product Differentiation | <ul style="list-style-type: none"> <li><a href="#">Identity Cloud</a></li> <li><a href="#">Data Governance</a></li> <li><a href="#">Identity Analytics</a></li> <li><a href="#">Identity of Things</a></li> </ul>               |
| 2018 | Growth With Profitability                      | <ul style="list-style-type: none"> <li><a href="#">Organizational Strategy</a></li> <li><a href="#">Offshore Leverage</a></li> <li><a href="#">Market Development</a></li> <li><a href="#">Break Even Operations</a></li> </ul> |
| 2019 | Hyper-Growth With Ecosystem Collaboration      | <ul style="list-style-type: none"> <li>Strategic Alliances Investment</li> <li>Industry G2M Specialization</li> <li>Partner Joint Ventures / Dev</li> <li>Mezzanine Capitalization</li> </ul>                                   |
| 2020 | Revenue Maturity Maximizing Shareholder ROI    | <ul style="list-style-type: none"> <li>M&amp;A</li> <li>Global Expansion</li> <li>Growth Restructuring</li> <li>IPO Preparation (S1)</li> </ul>   |

Each quarter we focused the entire senior team on the “Top 3”. These fed into each executives “Top 5 MBOs” every quarter.

| Quarter | Theme              | Top 3 Company Issues  |
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| 1Q16    | HighBar            |   |
| 2Q16    | Leadership         | <ol style="list-style-type: none"> <li>1. <b>How to Grow the EU Business</b> (It should will be the future growth engine with the upcoming data regulations)</li> <li>2. <b>Product Innovation</b> (the beginning of data &amp; analytics initiative establishing our key competitive advantage)</li> <li>3. <b>Creating an "ROI" picture for customers</b> (the beginning of our value proposition exercise and transformation for Customer Success)</li> </ol>  |
| 3Q16    | Profitable Revenue | <ol style="list-style-type: none"> <li>1. <b>Long-term Stability of the Platform:</b> How to achieve 99.999% consistently (based on our strategy to go after the high-end customer).</li> <li>2. <b>Delivery Partners:</b> How to prepare to deliver on what we sell (and profitably) through an ecosystem (vs. building too much PS into our P&amp;L).</li> <li>3. <b>Increase sales pipeline:</b> Reshaping our pipe with &gt;\$1B profile clients and adopting a better qualification criteria overall.</li> </ol> |
| 4Q16    | Business Metrics   | <ol style="list-style-type: none"> <li>1. <b>Lead-Gen:</b> Not enough pipeline from our SDRs, after our shift to the high-end. How to accelerate across all regions.</li> <li>2. <b>Marketing:</b> A much-needed team "reboot" with a clear focus on market awareness / thought leadership.</li> <li>3. <b>Documentation:</b> The only way to automate delivery is going to be through detailed documentation on our SaaS offering.</li> </ol>  |
| 1Q17    | Identity Cloud     | <ol style="list-style-type: none"> <li>1. <b>Win Against The Competition:</b> Since we only really had one significant competitor, our close rates should be 50%, right?</li> <li>2. <b>RFP Process:</b> Since we moved upstream, we were seeing a large increase in RFPs. Without the infrastructure to support this, we would have drowned.</li> <li>3. <b>SDR Program:</b> We moved the SDR team out of the sales org and into the marketing org. Then we rebooted it.</li> </ol>                                  |
| 2Q17    | Data Governance    | <ol style="list-style-type: none"> <li>1. <b>Sales Leadership:</b> improving win rates (how do we raise above the noise)</li> <li>2. <b>Marketing Support:</b> create a winning first meeting for sales (first pitch deck / messaging)</li> <li>3. <b>Professional Services Offerings:</b> to ensure</li> </ol>   |

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|      |                         | bookings/revenue ramp   |
| 3Q17 | Identity Analytics      | <ol style="list-style-type: none"> <li>1. <b>Gross Churn:</b> We needed another change in leadership, optimize the CSM role, refine the process, and focus on ROI with our customers. We moved from 75% to 90% including alot of forced/intentional churn.</li> <li>2. <b>Sales Pipeline:</b> Moving to a Pod model helped. We also spent time on optimizing the SDR role, changing our SEO, and marketing differently to each prospect buyer persona.</li> <li>3. <b>Engineering Velocity:</b> This involved a significant shift to our outsourced model (75 out of 200 people were captured near and off-shore resources in the end). We also needed to kill projects that were distracting our talent. We moved from 41 story points to 448 over three years with only a 50% increase in budget. 10x for 1.5x is a pretty phenomenal ROI.</li> </ol>   |
| 4Q17 | Identity of Things      | <ol style="list-style-type: none"> <li>1. <b>Sales Pipeline:</b> The sales team was screaming for more change.</li> <li>2. <b>Gross Churn:</b> This didn't get solved in 3Q17. In addition, we were "firing" bad customers.</li> <li>3. <b>PS Delivery:</b> As sales did begin to ramp, we knew delivering what we sold was going to be an issue. We needed to improve internal professional services as well as ramp our delivery partners more.</li> </ol>  |
| 1Q18 | Organizational Strategy | <ol style="list-style-type: none"> <li>1. <b>Messaging:</b> The sales team was demanding more awareness, and generally being first to the table. Marketing &amp; sales leadership advocated for a revisit of our messaging to help with this.</li> <li>2. <b>Gross Churn:</b> Moving to 90%+ in GRR and a healthy 35% expansion in the base for a net retention or DRR of 125% required us to increment our target to 105% in 2018, 115% in 2019, and 125% in 2020. Note: we hit 117% in 2018 based on the work we began at this QBR.</li> <li>3. <b>Alliances:</b> We knew that growth in 2018 would require a solid set of delivery partners. But we also knew that 2019 wouldn't become the year of hyper-growth or non-linear growth without laying the seeds for 1-2 strategic partners in 2018 (those became PwC and CapGem eventually).</li> </ol> |
| 2Q18 | Offshore Leverage       | <ol style="list-style-type: none"> <li>1. <b>Ability to provision quickly:</b> This was a DevOps initiative that would allow us to further automate templated configurations, which could be customized after initial deployment - reducing time to deploy and time to revenue recognition.</li> <li>2. <b>Self-service = scaling sales:</b> We needed to prioritize new SaaS functionality that would not only differentiate the business, but allow clients to scale their application</li> </ol>   |

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|      |                       | <p>deployments faster, and without heavy professional services.</p> <p>3. <b>Implementation Training:</b> Time to create educational videos and core curriculum that will enable the channel, and empower our customers.</p>  |
| 3Q18 | Market Development    | <p>1. <b>Partner Access to our SaaS admin systems:</b> This was an engineering/infosec challenge.</p> <p>2. <b>Partner Training Materials:</b> Our training director needed more support/budget to accelerate this.</p> <p>3. <b>Self-Service Feature Release to Customers/Partners:</b> We were awaiting the launch of a new SaaS module we labeled as "Hosted Login".</p>   |
| 4Q18 | Break Even Operations | <p>1. <b>Closing out the year, above plan:</b> We closed this quarter above plan on all metrics - the top three being annual first-year bookings, net dollar retention rate, and net cash burn.</p> <p>2. <b>Managing your own M&amp;A process:</b> The number of due diligence items doubled over the course of the quarter. That just begins to summarize it.</p> <p>3. <b>Doing the two above and maintaining our sanity:</b> Putting two companies together is no small feat. Few buyers understand the burden it places on a team when you're being asked to work a day and night job.</p> |

We brought in outside perspective for each of the senior team members / business functions.

| Quarter | Theme              | External Speakers   |
|---------|--------------------|---|
| 1Q16    | HighBar            |   |
| 2Q16    | Leadership         | <p>Focus: Finance + Product + Engineering</p> <ul style="list-style-type: none"> <li>• PacificCrest Securities analyst, Brendan Barnicle, to review what is now the <a href="#">KeyBank SaaS Survey</a> benchmarks that we used to establish targets across the entire business.</li> <li>• O'Reilly Media's <a href="#">VP of Innovation, Roger Magoulas</a>, who at the time chaired the largest Big Data &amp; Analytics conference globally - <a href="#">Strata</a>. He was (and is) one of the most well-connected and knowledgeable people in the "data and analytics space". We used Roger to establish our thesis around the use of identity data and behavioral analytics as a key differentiator for both marketing and security use cases.</li> <li>• In addition, as part of early needed transformation, Janrain was a waterfall development shop in desperate need of agile. We invited in <a href="#">Kelley Harris</a>, Agile Consultant &amp; Trainer, who is part of <a href="#">SourceCell</a>. Kelley brought Agile, Scrum, Lean, Lean Startup, Design Thinking, and more to the Janrain team. It was a "religious war" until Kelley came in.</li> </ul> |
| 3Q16    | Profitable Revenue | <p>Focus: Product</p> <ul style="list-style-type: none"> <li>• We invited the founder, <a href="#">Dean Malmgren</a>, of <a href="#">Datascopes</a>, a data science consultancy of over 20 of the brightest data-savvy minds (and later <a href="#">acquired by IDEQ</a>).</li> </ul>   |
| 4Q16    | Business Metrics   | <p>Focus: Sales</p> <ul style="list-style-type: none"> <li>• <a href="#">Bob Gregoire</a>, a sales strategist and Sandler executive coach, to help us think about our sales model on three axis: Attitude, Technique, and Behavior.</li> </ul>  |
| 1Q17    | Identity Cloud     | <p>Focus: Customer Success</p> <ul style="list-style-type: none"> <li>• <a href="#">Joshua Fox</a>, who ran the Americas Digital Applications diversified business at CSC. He was one of the more creative guys when it came to account management</li> </ul>   |
| 2Q17    | Data Governance    | <p>Focus: Professional Services</p> <ul style="list-style-type: none"> <li>• <a href="#">Keith Carlson</a>, "master" of professional services within SaaS companies. Keith started in Andersen Consulting as part of <a href="#">Arthur Andersen</a>. This was before it was spun out to make Accenture.</li> </ul>   |
| 3Q17    | Identity Analytics | <p>Focus: Engineering</p> <ul style="list-style-type: none"> <li>• Invited in <a href="#">Dhruv Bansal</a>. He and <a href="#">Destry Saul</a> had helped us accelerate our data products work at Janrain over the previous two quarters. At the QBR, we summarized that work, which essentially was my</li> </ul>  |

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|      |                         | way of kicking us in the pants around the data products work I had envisioned back in early 2016.  |
| 4Q17 | Identity of Things      | <p>Focus: Product + HR</p> <ul style="list-style-type: none"> <li>• <a href="#">Danny Yu</a> and <a href="#">Ken Forster</a> are a couple of guys I trusted and more broadly the <a href="#">Momenta Partners</a> team has been fantastic in <a href="#">being on the cutting edge of IoT</a>.</li> <li>• Zappos HR team worked on three areas of culture.</li> </ul>  |
| 1Q18 | Organizational Strategy | <p>Focus: Customer Success + Marketing</p> <ul style="list-style-type: none"> <li>• To kick things off for my new CRO / Global Head of Revenue, I first invited in the master of Customer Success, <a href="#">CEO of Gainsight, Nick Mehta</a>.</li> <li>• Then I also invited in <a href="#">Ken Rutsky, master of marketing messaging</a>, to run us through a new market messaging exercise that covered topics focused on helping us win new logos</li> </ul>   |
| 2Q18 | Offshore Leverage       | <p>Focus: Sales &amp; Marketing</p> <ul style="list-style-type: none"> <li>• Invited the <a href="#">LBrands CISO, Patrick Reidy</a>. It was a treat to discuss "how to sell to the security team" by talking to the top of the security food chain.</li> </ul>  |
| 3Q18 | Market Development      | <p>Focus: Europe + Marketing</p> <ul style="list-style-type: none"> <li>• We invited <a href="#">Mark Danaher</a> to help with our EU business planning and execution. At this QBR Mark and our EU Managing Director presented their work.</li> <li>• We also invited the <a href="#">Topo Group (Eric Wittlake)</a> to assist in our marketing benchmark targets, adjustments required to hit those targets, and a management system to monitor and optimize - it's "Gartner" (aka benchmarks) + "McKinsey" (aka change management) for marketing and sales.</li> </ul> |
| 4Q18 | Break Even Operations   | <p>Focus: Product</p> <ul style="list-style-type: none"> <li>• We brought in <a href="#">Heath Gross</a>, former US counterintelligence agent turned competitive intelligence strategist and CEO of the <a href="#">Sedulo Group</a> (leading Competitive Intelligence consultancy).</li> </ul>  |

These are actual playbooks we deployed each quarter. There were other workstreams, but these had buy-in by the entire senior team.

| Quarter | Theme              | Playbooks  |
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| 1Q16    | HighBar            |  |
| 2Q16    | Leadership         | <ol style="list-style-type: none"> <li>1. Taking a <b>Myers Briggs</b> test and analyzing the results with the team together.</li> <li>2. Having all team members read "<b>Five Dysfunctions of a Team</b>" and discussing similarities at our company</li> <li>3. Asking the team <b>6 personal questions</b> which gave them all a deeper view into who they were</li> <li>4. Leading them through their first "<b>Team 360</b>"</li> <li>5. Performing a Senior Team 1:1 <b>Risk/Operational Assessment</b></li> <li>6. Leading them through a <b>Staff Talent Assessment</b> (of the entire company)</li> <li>7. Indoctrinating them into my "<b>Management System</b>"</li> <li>8. Establishing the right <b>hiring plan</b></li> <li>9. Creating a <b>KPI Dashboard</b> by business function (with key target values for all metrics)</li> <li>10. <b>Issue processing</b> - Identifying &amp; solutioning the "Top 3 business issues" for the company</li> <li>11. <b>Setting Quarterly "Top 5 MBOs"</b> by business function (and executive) &lt;- key for alignment</li> <li>12. Establishing an <b>Annual "Painted Picture"</b> Strategic Planning Process</li> <li>13. Laying the Groundwork for the <b>#1 Future Competitive Differentiator</b></li> <li>14. <b>TCO/ROI modeling</b> that would fuel our value proposition messaging</li> <li>15. Moving from <b>Waterfall to Agile</b></li> </ol> |
| 3Q16    | Profitable Revenue | <ol style="list-style-type: none"> <li>1. <b>Product Innovation MVP</b>: Using outside consultants to help establish a thesis on future potential MVPs we could use to differentiate the company (we used IDEO + Datascope).</li> <li>2. <b>Use-of-Funds Workshop</b>: Making sure we are always spending our money on the right areas of the business</li> <li>3. <b>Top 3 Issues Processing</b>: Brainstorming on what the entire company would attempt to solve in the next quarter across organizations.</li> <li>4. <b>Business Metrics Walkthrough</b>: Knowing your key metrics by business function, know the industry benchmark, and starting to devise a plan on how to accurately capture and compare on a monthly basis.</li> <li>5. <b>Painted Picture</b>: We created "2016 Goals" by senior team member (what would "success" look like for each exec year-end on December 31st, 2016?), and then I pushed past 2016 to a mid-point in the 5-year plan, aligning the team behind the goal of: 1) revenue = 2x</li> </ol>  |

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|  |  | <p>of 2016, 2) requiring 50% YoY booking growth, 3) profitability (or cash-flow BE), 4) all by mid-2018 (2 years from the exercise).</p> <ol style="list-style-type: none"> <li>6. <b>Profitability (P&amp;L) by Customer:</b> The purpose of the exercise is to address questions like: 1) What is the “cut-off” for a customer worth pursuing? Do we use size of identity footprint? ARR? 2) How do we operationalize this with sales? ARR minimum? 3) Effectively filter out in our qualification process 4) What do we do with the existing customers who fall “below the line”? Fire them? How/When? 5) How do we improve profitability of existing and future customers (aka higher GM)?</li> <li>7. <b>Sales Strategy &amp; Plan:</b> Profitable revenue requires a sales strategy by region, by rep, by product. We had to redefine account assignments, a minimum ARR target, and pipeline qualification (pick your methodology: ANUM or BANT)</li> <li>8. <b>Professional Services Capacity Planning:</b> Addressing capacity concerns so that we don’t trip up sales with the lack of ability to deliver.</li> <li>9. <b>Customer Success DRR Review:</b> This is a detailed exercise in planning to achieve a healthy Dollar Retention Rate (DRR). It is a “twelve-step” process including: 1) DRR YTD (Gross Retention + Add-on) vs. Goal; 2) Total Year Outlook/Projection (Closed-Won, Commit, Forecast to close, Closed-Lost); 3) By Quarter Q1-Q4; 4) Q1 Loss Summary; 5) Q2 Loss Summary; 6) 2H Upcoming Renewals by Account; 7) Analysis on Add-Ons vs. Price-Downs 8) Health by Account; 9) Utilization of platform by Account (Used vs. Sold); 10) Red Account Plans; 11) Summary of Customer Success Manager assignments; 12) Key Accounts with Plans vs. Yet to be completed.</li> <li>10. <b>Partner Strategy &amp; Plan:</b> This includes: Key KPIs, partner category definitions, associated business models (including target gross margins), matrix in steady state, quarterly plan and objectives summary with “asks”.</li> <li>11. <b>Cost of Customer Acquisition by Market Segment:</b> Customer acquisition cost (CAC) is a metric that has been growing in use for SaaS companies. The CAC can be calculated by simply dividing all the costs spent on acquiring a customer (marketing and sales expenses) by the number of customers acquired in the period the money was spent. For example, if a company spent \$100 on marketing &amp; sales in a year and acquired 100 customers in the same year, their CAC is \$1.00.</li> <li>12. <b>Product Backlog Prioritization:</b> How to measure: 1) roadmap item value to the business (customer \$revenue increase, customer sat increase, cost of infrastructure decrease), 2) Level of effort associated in building, 3) Risk associated in our estimates; 4) priority = function of (value / cost) * Risk Factor.</li> </ol> |
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|      |                  | <p>13. <b>Engineering Velocity Allocation:</b> Early on we began to measure and target how we allocated our “build engine” of engineering talent. We categorized by: 1) Run the Engine (RTE) which included production support and maintenance, 2) Customer Commits which included product roadmap items we knew customers needed (in some cases we needed to commit to in order to win RFPs), and 3) Innovation which covered our experimentation and more advanced new capability research (adv R&amp;D). The desire was to get to a 20/60/20 vs. the 60/35/5 we were at during this particular quarter.</p> <p>14. <b>Corporate Development Strategy:</b> Senior team analysis of 1+1=5 scenarios – categories of ecosystem players, brainstorming with one leader in each category.</p> <p>15. <b>Executive Sponsor Program:</b> Goals, duties as an executive sponsor, selection of customers and executive sponsors.</p> <p>16. <b>Product P&amp;L and Customer ROI Analysis:</b> This is an exercise that supports categorizing your offerings into the BCG matrix of 1) Dogs, 2) Cash Cows, 3) Questions Marks, 4) Stars.</p> <p>17. <b>Vision, Mission, Values + Employee Sat:</b> This is one of my focus areas, as it anchors across so many parts of the business, including G2M. We also included a workshop on how to properly measure internal employee satisfaction, knowing that change management was going to be key. We set up the TinyPulse platform, established a monthly “Cultural Ambassador” program, and encouraged “cheers for peers”. We also kicked off a “values” initiative which involved the whole company.</p> <p>18. <b>Pricing &amp; Packaging:</b> A complete overhaul in the pricing model, effectively an increase in all pricing by 20%, the addition of support tiers, etc. How else can you achieve the “profitability” component along side of revenue growth?</p> <p>19. <b>Top 5:</b> Setting Quarterly “Top 5 MBOs” by business function (and executive) &lt;- key for alignment.</p> |
| 4Q16 | Business Metrics | <p>1. <b>Strategic Planning w/ a Painted Picture:</b> We envisioned what the company would look like at \$100M for each department and then worked backwards. We used three guiding principals that I delivered in the form of well-known cliches: 1) Leaders won't have all the right answers, but they need to ask the right questions; 2) “If the rate of change on the outside exceeds the rate of change on the inside, then the end is near” Jack Welch GE; 3) Visualize first. Then Plan</p> <p>2. <b>Top 3 Issues Processing (from Sales):</b> Doing a workshop with the entire sales team on top issues and putting all the senior team behind action plans.</p>  |

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|  |  | <ol style="list-style-type: none"> <li>3. <b>Use of Funds (out of cycle):</b> When, where, and how to invest more than what's in the original budget. An exercise to challenge the status quo.</li> <li>4. <b>Marketing Strategy for a Path to Pipe (Regions, Industries, Offerings):</b> Using <a href="#">Topo</a>'s marketing benchmarks to really hone in on areas to improve. We wanted a 5x improvement in pipeline overall. This required significant enhancements to our messaging, competitive positioning, optimized paths to our customers and ultimately an increase in conversion rates across the engagement lifecycle, reduced sales cycles, etc.</li> <li>5. <b>Sales Strategy with A New Organizational Model:</b> We created a POD model that was arranged by regions, moving to a more combined target and compensation.</li> <li>6. <b>Product Strategy by Breaking down the Roadmap:</b> I wanted the team to segment our roadmap into specific areas and focus on one area at a time. For example, at Janrain we wanted an "Identity Data and Analytics" roadmap.</li> <li>7. <b>Professional Services Strategy with New Offerings:</b> This was a playbook workshop to help define our service offerings</li> <li>8. <b>Customer Support Strategy with Extended Team:</b> This involved a playbook on how to extend Janrain's support with partners to achieve the right global coverage. There is also a heavy component of analyzing where customer support comes from (aka engineering, professional services, customer success, and then actual technical support people dedicated to the function).</li> <li>9. <b>Customer Success Strategy for Higher DRR:</b> I laid down the goals for DRR by end of 2017 and 2018. We then initiated a workshop to achieve those goals.</li> <li>10. <b>Alliances Strategy a Year In Advance:</b> A standard playbook for a SaaS company is to identify the right type, number, and timing for the indirect sales channel. We needed a strategy for global delivery coverage as well as an indirect sales G2M. The plan was to start this process, knowing that it would take all of 2017 to establish the right strategic partner relationships.</li> <li>11. <b>Pricing Strategy with Bundles:</b> We needed to roll out new bundles of SaaS subscription, Support, Pro Serve to the sales team. We came up with four bundles - two that were land and expand for "small" accounts, and two that were effectively "medium" and "large" offerings that we spent 90% of our energy on.</li> <li>12. <b>DevOps Strategy for a Global SaaS Footprint (by Region):</b> Some SaaS providers have it easy where they can deploy out of a minimal set of cloud regions to serve their clients globally. We were not so lucky. So we needed a clear strategy on cloud infrastructure investments.</li> <li>13. <b>Security, Privacy, GRC Strategy and How to</b></li> </ol> |
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|      |                | <p><b>Package:</b> Security became our focus and privacy/compliance a byproduct of heavier regulations. There was a clear playbook on how to begin leveraging our position better in marketing and sales positioning.</p> <p>14. <b>HR Strategy &amp; Building our Pools:</b> Knowing that Janrain would require a significant investment in A-team capabilities. We needed playbooks for recruiting (getting the right talent in our pipeline), effective interviewing, repeatable/scalable onboarding. In this workshop we asked three key questions: 1) Do we have the right mix of resources across the functional groups? Aka how do we compare to other companies of similar revenue? 2) How do we correct our staff maturity level? We have many “junior” staff members who don’t have the skills to address the enterprise challenges faced by our company. and 3) We’re going to lose some of our top quartile staff. How do we make sure we’re ready to quickly backfill?</p> <p>15. <b>Corp Dev Strategy around Inorganic Growth:</b> We ended up looking at 30 companies, 3 of which we approached to buy. Companies need to look at their core, but also consider adjacencies and potentially game-changing/disruptive moves.</p> <p>16. <b>Finance By the Metrics:</b> This was the beginning of our corporate dashboard, which we completed by end of 2016. Some use ERP systems, we used google sheets and <a href="#">Geckoboard</a>.</p> <p>17. <b>Staff 360:</b> My Staff 360 hasn't changed much over a decade. We looked at performance vs. potential for each executive team member. All senior team was ranked on a 9-cell matrix by each other (including me, of course) and open dialog/discussion ensued. Without this, you don't make the corrections in behavior, changes in team, and ultimately negative energy will build up. This playbook has to be one of my most powerful because it has been the most effective release valve, self-reflection &amp; improvement, and peer alignment tool I've ever used.</p> <p>18. <b>Budgeting:</b> How do you take what's in your "painted picture" and realize a budget that both your team and the board can approve. This takes a whole quarter to complete, one Board prep meeting, and a final Board approval meeting.</p> <p>19. <b>Team Objectives Exercise - Top 5:</b> This is the cornerstone playbook for senior team alignment every quarter. How to use it as a communication package for all the company.</p> |
| 1Q17 | Identity Cloud | <p>1. <b>Win Themes:</b> How does a company regain it's #1 status in the industry?</p> <p>2. <b>How to Win Against The Competition:</b> There are playbooks for bad behavior by the competition like: 1)</p>  |

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|  |  | <p>underpricing (buying the customer), 2) FUD, 3) Knowing your competition's key value props and positioning, 4) getting the whole organization aware and contributing to becoming #1.</p> <ol style="list-style-type: none"> <li>3. <b>"Product Differentiation" Means What?:</b> Looking at product, services, and partners and determining what to double down on - less is more.</li> <li>4. <b>Vertical Strategy:</b> How to align marketing and sales behind no more than three verticals at a time. Which ones? How to create vertical programs?</li> <li>5. <b>Metrics In Review:</b> Analyzing the past year vs. targets vs. benchmark vs. the next year.</li> <li>6. <b>Building Pipeline with Marketing:</b> A data-driven roll-up including inquiries to SQLs on inbound; SDR campaign calls/meetings to SQLs on outbound; and breaking it down to its components - email nurturing, SEM/SEO, ABM, events, partner MDF, content, content, and content.</li> <li>7. <b>Forecasting current AND next quarter with Sales:</b> Forecast methodologies that never miss.</li> <li>8. <b>Delivering on Strategic Professional Services:</b> How does a SaaS company build professional services that deliver ROI on time, on budget, and within scope.</li> <li>9. <b>Non-Linearity with Laser-Focused Alliances:</b> A three-tier partner model.</li> <li>10. <b>A Path to 60% Product Velocity for Engineering:</b> A playbook to reducing "Run the Engine".</li> <li>11. <b>Platform Capabilities by Region is more than Operations:</b> Many SaaS companies don't properly plan for global coverage - how to reduce impact on customers and on staff.</li> <li>12. <b>Optimizing Your Support Model:</b> 1) Support Definitions: Service-Level Severities (S1-3: contractual obligation) vs. Customer Priorities (P1-3: customer time-to-fix request) vs. Support Staff Levels (L1-3: organizational process flows), 2) Support Work Flows (analysis with actual ticket volumes), 3) Customer analysis of each severity level.</li> <li>13. <b>Recruiting &amp; Hiring A-Team Changes our Cultural Pyramid:</b> 1) Identifying the top roles for each of your departments, 2) Specifications for those roles 3) Building lists of LinkedIn profiles to target 4) Allocating time to "get-to-know" candidates, regardless of whether you have an open position.</li> <li>14. <b>Finalizing the Budget - Operating Letters:</b> Have you ever given your senior team letters from the CFO that summarize/confirm headcount and expense models for your department; including the excel models that support them? It's content, not form.</li> <li>15. <b>Team Objectives Exercise - Top 5:</b> This is the cornerstone playbook for senior team alignment every quarter. How to use it as a communication package for all the company.</li> <li>16. <b>Senior Team 360:</b> Performance vs. Potential as perceived by your peers. You're not allowed to speak,</li> </ol> |
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|      |                 | only listen and say, "thank you".   |
| 2Q17 | Data Governance | <ul style="list-style-type: none"> <li>• <b>Consulting within a SaaS Company - The Art of the Possible &amp; Pitfalls:</b> starting with an implementation services workshop, followed by reviewing leading case studies, and digging into PS strategy, sales/marketing, offering development, talent management, operations, and metrics/management.</li> <li>• <b>The Trojan Horse:</b> How to accelerate sales programs that cause your competition to lose their balance. Ideas here can lead to sales-only approaches, marketing campaigns, and even new quick-wins with feature/function additions to the roadmap. For us this led to giving away parts of our SaaS offering for free, leveraging data breaches more in our marketing campaigns, and accelerating SIEM integration in our roadmap.</li> <li>• <b>Targeting the Right Customers:</b> A detailed data exercise analyzing target account lists by rep and reorganizing/prioritizing by total IT spend and core target verticals.</li> <li>• <b>Win/Loss Analysis:</b> this always results in both marketing and sales rethinking (new vs. add-on; RFP vs. not; etc). In our case, this resulted in looking at previously deferred, gone quiet, and up for competitive renewal lists. We didn't want to see anything less than 30% on new logos, ideally 50%.</li> <li>• <b>Content is King:</b> Q1 was a booking miss, resulting in us going back to the basics. Re-benchmarking marketing metrics, analyzing awareness vs. lead-gen campaigns, and CONTENT strategy. Have you analyzed your competitor's content, what the industry influencers are talking about, and all the content your buyer cares about ranked? How do you measure your "voice" vs. your competition?</li> <li>• <b>Alliance Strategy (Delivery, Consulting, GDPR, IoT):</b> A playbook that involves revisiting 1) Definitions: What are your target partners 2) Roadmap by Region: NA, EU, APAC, LATAM; and target coverage (e.g. 2x) 3) Scorecards: Partner capabilities / performance 4) Management System: What are your venues to govern your partner strategy 5) Operations: How are you tracking/measuring success 6) Partner Marketing: What is necessary to win.</li> <li>• <b>DRR Plan by Account by CSM Book:</b> This is a detailed analysis by customer success manager book of business. It involves past performance and forecast plans. It includes what each CSM has for add-on business they are going after.</li> <li>• <b>Support Packages by Account:</b> You know what your support packages are, but do you know how much time your team is spending across your customer list and their corresponding quartiles? The big question</li> </ul> |

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|      |                    | <p>that usually comes out of this is what is the team's strategy to both educate customers to become more self-sufficient as well as adjust their support packages to account for their demands? Support package upsells, staffing, process/workflow improvements can also be achieved.</p> <ul style="list-style-type: none"> <li>• <b>BVD Analysis:</b> "Business Value Deliverable" was the acronym - otherwise known as the market requirement that drives MRDs (market requirement documents) and PRDs (product requirement documents). Having a list of market requirements and prioritizing them by value to the customer, level of effort to development, and overall risk to achieving success is hard. Intake processes and requirement tracking throughout the agile process are never easy - but it's core to good product management.</li> <li>• <b>Innovation Projects:</b> This is my way of making sure we 1) are differentiating the core, 2) considering adjacencies, and 3) brainstorming disruptive moves. Minimally, I like to make sure we have at least 10% of our velocity, ideally 20%, being applied to "innovation" compared to 70% to core product roadmap (requested by clients) and 20% to simply running and maintaining (fixing / technical debt, etc.).</li> <li>• <b>Story-Telling with Your Roadmaps:</b> This is a product management playbook where we speak to a 5-year vision roadmap. How do you remain vague enough to stay away from locking into things well beyond your agile backlog, but provide the staff, your partner ecosystem, customers, and analysts the confidence that you know your business better than anyone?</li> <li>• <b>Talent Assessment:</b> an annual exercise around replacing the bottom 20% (the 5s and 4s), nurturing the middle 60% (3s &amp; 2s), and modeling/rewarding the top 20% (your 1s). Leadership optimized continuously, but we reviewed as a team once a year.</li> <li>• <b>Last Qtr Results / Future Qtr Adjustments:</b> Miss your last quarter? Then reduce your spend. Over-achieve? Re-invest or save for a rainy day.</li> <li>• <b>Another competitive view:</b> I love dissecting analyst reports - their factors used, the weightings; and then performing a GAP analysis to achieving #1 status. It provides a clearer path involving messaging, analyst briefings, and feature/function prioritization sometimes.</li> <li>• <b>Team Objectives Exercise - Top 5:</b> This is the cornerstone playbook for senior team alignment every quarter. How to use it as a communication package for all the company.</li> <li>• <b>Senior Team 360:</b> Performance vs. Potential as perceived by your peers. You're not allowed to speak, only listen and say, "thank you".</li> </ul> |
| 3Q17 | Identity Analytics | <ul style="list-style-type: none"> <li>• <b>Renewal Analysis:</b> I had the finance team run through the data in detail. We sliced and diced again. I was</li> </ul>  |

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|  |  | <p>ready to go through this analysis again, and again, and again...with the key purpose on how to invest in raising our GRR. For 2017 we had a simple goal of 90% GRR with a 15% add-on/expansion driving a DRR of 105%. In the end, we hit 117%.</p> <ul style="list-style-type: none"> <li>• <b>Top 3 Exercise:</b> We always wanted to align the whole company behind knocking out three big issues that cut across all organizations. If your quarterly MBOs didn't contribute to one or more of these, you were doing something wrong.</li> <li>• <b>Financial Cash Analysis:</b> We had achieved one of the largest quarters in the company's history in 2Q. However, our strength in sales bookings was offset by softness in renewals (we were at a DRR of 95% against a target of 99%). It always helps align the team around spend when you look at the big picture. This playbook always keeps one variable constant - cash.</li> <li>• <b>Renewal Stages / Checklist:</b> Just as you have sales stages, you need renewal stages. From the time a new logo closes to the time that they renewal. What stages of probability do you use? Have you applied those stages to each of your clients to help predict churn. Each stage provides for a simple check-list to advance clients to the next stage.</li> <li>• <b>Top 10 Clients Support Burden - A Path for Training:</b> In order to assess your support package effectiveness, you have to look at your leading clients (what will everyone look like when they all grow up?). Ticket volume, by severity level, YoY change in volume, developer-centric support, health. A data-driven exercise can really help you fine-tune your support model.</li> <li>• <b>PS Advisory Plan:</b> If any playbook failed during my 3 years it was this one. We attempted to seed our professional services teams in the US and Europe with a "practice partner" supported by an "offering development" person in Product Management. Our thesis was that "tip of the spear" consulting could help us our clients see value, our sales team sell value, and ultimately for us to increase ROI.</li> <li>• <b>HR - Job Leveling &amp; Career Pathing:</b> I wanted a clear understanding of how everyone in the company would advance in their career. I called it "career pathing" and my head of culture/HR started this playbook with a "title leveling" exercise - making sure everyone was in the right job title / classification before creating the progression tracks.</li> <li>• <b>SDR Coverage Model:</b> Do you have the right talent in the right regions working on both inbound and outbound with the right model?</li> <li>• <b>Sales Pipeline - Build &amp; Prosecute:</b> How to build and how to forecast accurately.</li> <li>• <b>Marketing Customer Advisory &amp; Exec Sponsorship:</b> Investing into a CAB (customer advisory board) turned out to be one of the hardest</li> </ul> |
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|  |  | <p>tasks for my marketing leadership to drive. We wanted to uncover latent challenges in our larger accounts. Higher ARR or brand value means that more management attention is needed. We customized our approach for larger accounts, meaning that more intimate knowledge of the account was required than CSM team leaders generally have the bandwidth to acquire for every account. So we assigned top accounts to executives across departments to give exposure to real customer issues in depth. The Top 50 clients across 10 execs as a start.</p> <ul style="list-style-type: none"> <li>• <b>Alliances Pipeline for Current &amp; Prospect Deals:</b> You have to drive a "partner-led" or "partner-first" or "all-in partner" program from the top. Leads sourced and influenced by partners doesn't happen without an investment. And it's not rocket science to know that partner-led deals have a higher close rate than not, and that on average you can drive down your sales cycles with well-run partner programs.</li> <li>• <b>BVD Analysis / Deepdive:</b> I kept hammering on Product to develop a thoughtful roadmap process that was organized by categories of product value/assets. It was becoming very clear that we needed new thinking around the process at this point, which led to inviting in <a href="#">Todd Etchieson</a> by March of 2018 (a process we started in 3Q17). BVD stands for "Business Value Deliverable" (it's another phrase describing a "Market Requirement").</li> <li>• <b>R&amp;D Q3 Backlog for Data &amp; Analytics (mini IRB + SCRUM plan):</b> After running our BVDs, we ran a playbook to study our backlog, the roadmap, and how our needs for Data &amp; Analytics activities were being accomplished this quarter. There was no letting up on the strategy.</li> <li>• <b>DevOps - Productizing our Identity Cloud Management:</b> This is one of my more favorite exercises. Most SaaS companies lose sight of the value invested in cloud automation. We had 7 million lines of code (LOC) for our services and almost a million in cloud automation that covered: 1) provisioning, 2) serverless functions for alerts, WAF reputation, monitoring, and RI reallocation, 3) AWS instance management, 4) and our core identity services management...all for deployment. Then we had cloud automation for optimization covering: 1) scale-up/down, 2) cloudformation, and Terraform management. It was time to "productize" this with clear representation of the DevOps team on the Product Team. This is a playbook that many overlook.</li> <li>• <b>Privacy - GDPR Readiness Review (Services/Product, Resources, Pipe):</b> My VP of Privacy was handed a playbook that forced the team to inventory our GDPR solutions, review our regulation-centric partners, assess our ability to deliver GDPR-compliance for our clients, discuss those in</li> </ul> |
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|      |                    | <p>GDPR remediation already and in the pipeline for such, and continue to highlight areas where the product required more (BTW, our CISO/Infosec requirements were represented at the Product Management table as well).</p> <ul style="list-style-type: none"> <li>• <b>Critical Hires:</b> This is a playbook that focuses on the hiring plan across all functions as a team. We did this during our QBR team event.</li> <li>• <b>Team Objectives Exercise – Top 5:</b> This is the cornerstone playbook for senior team alignment every quarter. How to use it as a communication package for all the company.</li> <li>• <b>Senior Team 360:</b> Performance vs. Potential as perceived by your peers. You're not allowed to speak, only listen and say, "thank you".</li> </ul>   |
| 4Q17 | Identity of Things | <ul style="list-style-type: none"> <li>• <b>2016a, 2017e, 2018p Reflections &amp; Analysis:</b> You have to set some pillars when you're planning your next year budget. For example: 1) No New Funding: Using the cash we have, 2) Apply sensitivities with three variations of your plan = a) Target (e.g. sales quota), b) BOD plan (e.g. 20% off of target), c) Worst-case scenario = reduced spend plan (e.g. 40% off of target); 3) Additional investments that push out Cash Flow Break Even to mid 2018; 4) Year over Year growth on bookings of 40%; 5) No increase in bank debt; 6) No acquisitions of other companies.</li> <li>• <b>Painted Pictures (2018 - 2020):</b> I held the end-year fixed so that we could simply leverage our last 5-year painted pictures, and then update. If someone asked me how I came up with my 5-year plan, it began with a painted picture exercise. I use my annual and quarterly annual themes and then add key metrics for each quarter.</li> <li>• <b>Finance Budget Analysis:</b> This is a year-to-date analysis of the P&amp;L that takes forecasts of bookings and DRR into account and analyzes "budget asks" for the quarter given the actuals. Its an extremely healthy exercise that forces execs to think about each other's asks holistically. Ask my teams - they love it.</li> <li>• <b>Sales - Win/Loss Analysis:</b> It's much more than (Dollars Closed-Won) / (Dollars Closed-Won + Dollars Closed-Lost). It's about understanding the details behind each loss and where it truly fits within categories like: 1) Product Feature/Function Deficiency 2) Deployment Concerns 3) Pricing Model/Levels 4) Experience in Industry / Use-Cases 5) Trust in team to execute (how well the sales team managed the process) 6) Customer References 7) Cloud Service Levels (Availability) 8) Demo/Orals (Did not "connect" with audience(s)) 9) Contract Terms (Issues with LOL, etc.)</li> <li>• <b>Alliances - Tech, ISV/VAR, GSI Strategy:</b> When you analyze which SIs are supporting your clients with your</li> </ul> |

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|  |  | <p>solution, you'll realize that people who you've never trained or certified might be representing you. We had a number of regional SIs being used to deliver our solutions. But then there were the many untrained client partners delivering our solutions, and a couple of strategics which we badly wanted to align our resources with. Strategy!!!</p> <ul style="list-style-type: none"> <li>• <b>Engineering/DevOps - Table Stakes:</b> I had a "skunk" project where I asked my team to list ALL the things they have been wanted to get done that was constantly being back-burnered. Things that I categorized as "table stakes" - meaning that we absolutely needed them for our clients, but for a number of reasons were still on the "to do" list. Why? Because I wanted to go to my Board and increase spend by 50% in engineering, and knock this list out by end of 2018...which is what we did.</li> <li>• <b>Customer Success - DRR Turnaround:</b> This was a repeat of the simple playbook - 1) What it will take to preserve GRR (gross retention) and 2) Increase Add-Ons for DRR. We needed to keep the pressure on that ultimately led to a future 90% GRR and 117% DRR.</li> <li>• <b>Technical Support - Developer's Happiness:</b> How do you provide the right level of "developer" support? It can be the most "draining" of your customer support / technical support resources. It can also be a force-multiplier since the developer communities are the largest within global 2K enterprises.</li> <li>• <b>Professional Services - On-demand Strategy:</b> Our PS resources were still running "hot". So we dug into 1) For Tier 1 account where we need to own the relationship, we would hire in support of the demand. 2) For Tier 1 where we are already invested with internal PS, we looked to transition PS demand over to a GSI only if they are "strategic" and we were fueling ecosystem growth, and 3) All other opportunities we leveraged an outsource model as needed.</li> <li>• <b>Privacy/Security - Itemizing Capabilities of Security, Privacy, &amp; Governance:</b> We dug into 1) Data Privacy (Providing consent on use) 2) Data Governance (Enforcing policy for the permitted purpose, or use) and 3) Data Security (Protecting access to our clients most important asset - their consumer data). We were beginning to package what we referred to as our "SecureEdge" offering. It was time.</li> <li>• <b>Product - Competitive Positioning for Sales:</b> We continued to apply playbooks to overcome the obstacles of "feature selling" and cracking the code with "solution selling" that involves key differentiators.</li> <li>• <b>Marketing Website Upgrade and Associated Messaging:</b> Ever plan and execute a complete overhaul of your website and deliver it within two quarters? We did.</li> </ul> |
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|      |                         | <ul style="list-style-type: none"> <li>• <b>EU Region - Growth Accelerators:</b> I wanted the EU to grow faster than the US. It was time to assess whether to double-down. FYI, we ended up putting the "peddle to the metal", leveraging our happy customer base. EMEA first-year-bookings grew to be 105.2% of BOD Plan in 2018; EMEA ARR Bookings ended at 135% of BOD Plan at a 59% YoY growth!!; and EMEA DRR ended at a blistering 140.09%!!! Our playbook/plan worked.</li> <li>• <b>The Strategy for Strategics:</b> Who to align more strongly with as technology partners that could create 1+1=5.</li> <li>• <b>HR - Recruiting Analysis:</b> We dug into things like 1) Overview of YTD 2017 Recruiting Fees 2) Success of Hires 2016-2017 3) What can we do better in Talent Acquisition? What is working and what is not? 4) Are we willing to invest in a Technical Recruiter in house to handle all initial screening and LinkedIn sourcing?</li> <li>• <b>Marketing Lead-Gen Review (Mrktg, Alliance, Sales):</b></li> <li>• <b>Team Objectives Exercise – Top 5:</b> This is the cornerstone playbook for senior team alignment every quarter. How to use it as a communication package for all the company.</li> <li>• <b>Senior Team 360:</b> Performance vs. Potential as perceived by your peers. You're not allowed to speak, only listen and say, "thank you".</li> </ul>      |
| 1Q18 | Organizational Strategy | <ol style="list-style-type: none"> <li>1. <b>Business Pain Points:</b> Workshop to chose our top 3 issues for the company</li> <li>2. <b>Business Strategy &amp; Themes:</b> I wanted to challenge our quarterly themes for 2018 since I had put this strategy together two years prior, I didn't want to rest on two-year old assumptions. I also had product themes for Engineering/Product Management that I wanted to discuss (Q1: Networked Fraud Protection; Q2: Identity Benchmarking; Q3: Customer Journey Optimization; Q4: Networked Personalization)</li> <li>3. <b>Engineering / Product Priorities:</b> We were PM-rudderless without a PM leader. How could we ensure proper market requirement intake, prioritization, and tracking? What were our "Customer Stakes" - features committed to customers already? What were our "Table Stakes"? - We used these to drive a 50% increase in budget for 2018. They were the needed improvements in the platform for us to be "at par" to scale the business; What were our "Strategic Stakes" - needed for companies who would become strong channel partners (and potential acquirers).</li> <li>4. <b>Alliances Workshop:</b> 1) Alliances Mission (the "all-in" model) 2) Current SWOT 3) Goals 4) Objectives/Strategy/Activities per Goal 5) Battle Plan.</li> <li>5. <b>Field Engineering Strategy:</b> This involved three</li> </ol> |

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|      |                   | <p>discrete plans: 1) solution engineering (sales cycle LOE, skill matrix, training/enablement, org structure), 2) professional services delivery (implementation services offerings, capacity planning, skills matrix, partner model, org structure), 3) professional services consulting (advisory services offerings, sales enablement, consulting skill matrix, org structure)</p> <p>6. <b>EU Operations – A P&amp;L View:</b> This was a business plan for the EU, along with a proposed matrix RACI.</p> <p>7. <b>ABM &amp; Installed-base Marketing Strategy:</b> We analyzed how to better market (and sell) to our target account base list; and then how to ignite our installed-base.</p> <p>8. <b>Competitive Positioning / Pricing:</b> Time to dig into the competitive position of each of our peers in identity.</p> <p>9. <b>Budget Overview:</b> A packed playbook where we dig into: 1) YoY changes in corporate goals - a. FYB b. DRR c. Net Burn; 2) P&amp;L overview w/ YoY changes; 3) Overall HC changes from current over each quarter; 4) Assumptions by each department; 5) Quota carrying capacity model; 6) SQL lead-gen model; 7) EU metrics.</p>  |
| 2Q18 | Offshore Leverage | <ul style="list-style-type: none"> <li>• <b>Top 3 Company Issues:</b> Never fear, we always think about the cross-functional issues.</li> <li>• <b>Buyer's Journey:</b> Analyzing how our clients engaged our company and how many were involved from the first touch to then next renewal.</li> <li>• <b>Pricing &amp; Packaging:</b> Looking for ways to simplify our model even further.</li> <li>• <b>Professional Services Packaging:</b> Were there ways to speed up delivery. Smaller starter packages which could be expanded/customized later?</li> <li>• <b>Support Packaging:</b> Can we simplify even further? Three levels to two?</li> <li>• <b>HR Title Level Framework, Career Pathing, Staff vs. Market:</b> The final package for staff - just in time for our August performance reviews. We nailed it.</li> <li>• <b>PS Delivery Issues Workshop:</b> How do you incorporate an SDLC into your service projects? Should you? Does software development always belong in engineering?</li> <li>• <b>Sales Win/Loss Workshop:</b> How do you get to 50% win rates?</li> <li>• <b>Alliance/Partner Strategy by Region:</b> Tier 1, 2, and 3 by region of the world (if you're selling globally). Certification and support.</li> <li>• <b>Content Creation Workshop:</b> Time to distribute the job of content down to the individuals. How to incentivize more to become authors?</li> <li>• <b>Analyst Relations:</b> Who and in what analyst groups? Awareness campaign?</li> <li>• <b>New Product Lifecycle Process:</b> Time to roll out a</li> </ul> |

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|      |                    | <p>Product Management process.</p> <ul style="list-style-type: none"> <li>• <b>CTO Office Priorities (Strategics, Key Prod Initiatives):</b> Architecture is what helps scale the business</li> <li>• <b>More self-service - a new model:</b> We needed to put more into the hands of clients to scale the business.</li> <li>• <b>Vertical Market Targeting Strategy and ABM List Refresh:</b> Vertical selection helps narrow the search. Client targets by region by rep.</li> <li>• <b>Q1 Review &amp; Q2 Spend Adjustments:</b> Cash is the constant. Our monthly operations review feeds into this playbook where we look at all the "requests" for budget increases.</li> <li>• <b>Senior Team Objectives:</b> Each senior exec aligns around a "Top 5".</li> <li>• <b>Organizational 360:</b> Never go a quarter without this. Peer reviews are powerful.</li> </ul>   |
| 3Q18 | Market Development | <ul style="list-style-type: none"> <li>• <b>EU Business Review:</b> This was a mid-year review where we dug into the entire P&amp;L for Europe with key objectives for every business function within the region.</li> <li>• <b>Alliances 2019 Strategy:</b> We needed to prepare for our partner-centric strategy in 2019. This meant getting our hiring plan flushed out well ahead of 4Q's budgeting process because we knew we needed to put things into motion in 3Q that would result in action in 4Q (e.g. we budgeted for an alliance team investment for 4Q).</li> <li>• <b>Marketing Analyst Strategy:</b> It was time to invest more in our analyst community. This meant Gartner, Forrester, KuppingerCole, TechVision, IDC, Ovum, Altimeter, and Aberdeen.</li> <li>• <b>HR Market Comp Analysis &amp; Equality Adjustments:</b> We were rolling out a complete compensation normalization in August to account for equality of pay regulations.</li> <li>• <b>Security Risk Register:</b> We wanted to revisit our ISMC approach to risk governance. We hired the CISO for Circle-K and we asked for some disruptive thinking on how to reduce risk.</li> <li>• <b>Product Top 5 by Product Area:</b> It was time to review roadmaps for each area of our solution-set. This involved five PM directors/managers as well. The goal in the Product organization is to achieve transparency of where development is (for the current quarter), what is coming down the pipe (aka the next quarter), and how our 12 month roadmap is adjusting (due to priorities and customer asks).</li> <li>• <b>Product Self-Service:</b> We wanted to continue to put pressure on the team to remove friction in the use of our SaaS platform.</li> <li>• <b>Prod/Eng/PS Application Development:</b> This was a detailed view how to "productize" our customer</li> </ul> |

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|      |                       | <p>integrations. Every new customer logo resulted in a potential "snowflake" or customized integration (what's your approach to connecting to the mainframe?). We needed a way to deliver new integrations within our SDLC, but without turning engineering into PS.</p> <ul style="list-style-type: none"> <li>• <b>Sales Top 20 Performance (AE Target Lists):</b> Time to review and adjust our sales team's contributions to SQL lead-gen (25% of our target leads).</li> <li>• <b>Finance Budget Asks, 1H Performance, 2H Budget:</b> Mid-year snapshot. We wanted to assess where we were on hitting break-even by end-of-year.</li> <li>• <b>Identity Companies Review:</b> It's healthy to gather as many statistics on our peers. It's a great task for our PE team resources.</li> <li>• <b>Top 3 Issue Processing:</b> A standard quarterly process to align the entire team behind the company's big issues.</li> <li>• <b>Q3 Objectives:</b> It sometimes results in debate, but it always results in alignment. What is each executive focusing on within their organization this quarter (it better align to the company's Top 3).</li> <li>• <b>Team 360:</b> How are we doing as a team. Time to dig into what's working and what needs help.</li> </ul> |
| 4Q18 | Break Even Operations | <ul style="list-style-type: none"> <li>• <b>Top 3 Issue Processing</b></li> <li>• <b>Sales Steady State</b></li> <li>• <b>HR LinkedIn Learning</b></li> <li>• <b>4Q Budget Asks</b></li> <li>• <b>Product Intake &amp; Prioritization Process Review</b></li> <li>• <b>Policy Management &amp; Upstream/Downstream Consent Enforcement (Key Product Feature 1)</b></li> <li>• <b>Adaptive, Risk-Based Authentication (Key Product Feature 2)</b></li> <li>• <b>Data Integration Framework (Key Product Feature 3)</b></li> <li>• <b>Progressive Registration / Profiling (Key Product Feature 4)</b></li> <li>• <b>Product Positioning Discussion / Workshop</b></li> <li>• <b>Product Roadmap Strategy</b></li> <li>• <b>Competitive Positioning Exercise (Post CI Session)</b></li> <li>• <b>2019 Pricing Strategy</b></li> <li>• <b>Q4 Objectives</b></li> <li>• <b>Senior Team 360</b></li> </ul>   |

| Business Function                      | Playbook   |
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| CEO (Management System, Exec Team)     | <ul style="list-style-type: none"> <li>• Senior Team Management System</li> <li>• Myers Briggs Segmentation / Analysis</li> <li>• Five Dysfunctions of a Team</li> <li>• Vision, Mission, Values</li> <li>• 5yr Painted Pictures</li> <li>• Business Strategy &amp; Themes</li> <li>• Top 3 Issue Processing</li> <li>• Qtrly Objectives</li> <li>• #1 Future Competitive Differentiator</li> <li>• Operations Review Kickstart - Metrics Walkthrough</li> </ul>   |
| Sales / SEs                            | <ul style="list-style-type: none"> <li>• Sales Strategy &amp; Plan for Profitable revenue</li> <li>• Sales Strategy &amp; Organizational Model (e.g. Pods)</li> <li>• Sales Steady State / Painted Picture</li> <li>• Commission plan restructure</li> <li>• Targeting the Right Customers</li> <li>• Sales Top 20 Performance (AE Target Lists)</li> <li>• Sales Win/Loss Workshop</li> <li>• Field Engineering Workshop (Pre-sales to Post)</li> <li>• Product - Competitive Positioning for Sales</li> <li>• Sales Pipeline - Build &amp; Prosecute</li> <li>• Disruptive Sales Programs for the Competition</li> </ul>   |
| SDRs                                   | <ul style="list-style-type: none"> <li>• SDR Coverage Model</li> <li>• Inbound vs. Outbound SQL pipeline generation</li> </ul>   |
| Alliances / Partners / Channel         | <ul style="list-style-type: none"> <li>• Alliances Strategy</li> <li>• Alliance Partner Strategy by Region</li> <li>• Alliance Partners - Tech, ISV/VAR, RSI, GSI Strategy</li> <li>• Alliance Pipeline for Current &amp; Prospect Deals</li> </ul>  |
| Marketing (Demand Gen, Prod Mrktg, PR) | <ul style="list-style-type: none"> <li>• Marketing Strategy: for a Path to Pipe (Regions, Industries, Offerings)</li> <li>• Marketing Leadgen Mix (inbound, outbound, partner, direct)</li> <li>• Marketing Leadgen Review (Mrktg, Alliance, Sales)</li> <li>• Buyer's Journey</li> <li>• Content Creation Workshop</li> <li>• Vertical Market Targeting Strategy and ABM List Refresh</li> <li>• ABM &amp; Installed-base Marketing Strategy</li> <li>• Marketing Website Upgrade and Associated Messaging</li> <li>• Marketing Customer Advisory Board &amp; Exec Team Sponsorship Programs</li> <li>• TCO/ROI modeling that would fuel our value proposition</li> </ul> |

|                              |  |
|------------------------------|--|
|                              | <p><b>messaging</b></p> <ul style="list-style-type: none"> <li>• <b>Cost of Customer Acquisition by Market Segment</b></li> <li>• <b>Analyst Strategy</b></li> <li>• <b>Analyst Relations (Who, What, How, Awareness Campaign)</b></li> <li>• <b>Analyst Report Deepdive - Another competitive view</b></li> </ul>   |
| Customer Success             | <ul style="list-style-type: none"> <li>• <b>Customer Success Strategy</b></li> <li>• <b>DRR Plan by Account by CSM Book</b></li> <li>• <b>Customer Success - DRR Turnaround</b></li> <li>• <b>Renewal Analysis</b></li> <li>• <b>Renewal Stages / Checklist</b></li> <li>• <b>CSM commission plan restructure</b></li> <li>• <b>DRR Total Year Outlook/Projection (Closed-Won, Commit, Forecast to close, Closed-Lost)</b></li> <li>• <b>DRR By Quarter</b></li> <li>• <b>Loss Summary &amp; Categorization</b></li> <li>• <b>Analysis on Add-Ons vs. Price-Downs</b></li> <li>• <b>Health by Account</b></li> <li>• <b>Utilization of platform by Account (Used vs. Sold)</b></li> <li>• <b>Red Account Plans</b></li> <li>• <b>Customer Success Manager assignments</b></li> <li>• <b>Key Account Plans</b></li> </ul> |
| Technical / Customer Support | <ul style="list-style-type: none"> <li>• <b>Support Strategy</b></li> <li>• <b>Support Packages by Account</b></li> <li>• <b>Support Packaging</b></li> <li>• <b>Technical Support - Developer's Happiness</b></li> <li>• <b>Top 10 Clients Support Burden</b></li> <li>• <b>Customer Support Strategy with Extended Team (outsourcing)</b></li> </ul>   |
| Professional Services        | <ul style="list-style-type: none"> <li>• <b>Professional Services Strategy</b></li> <li>• <b>Professional Services Capacity Planning</b></li> <li>• <b>Professional Services Packaging</b></li> <li>• <b>PS Delivery Issues Workshop</b></li> <li>• <b>Professional Services - On-demand Strategy</b></li> <li>• <b>PS Advisory Plan</b></li> <li>• <b>Consulting within a SaaS Company - The Art of the Possible &amp; Pitfalls</b></li> <li>• <b>PS Outsourcing</b></li> </ul>   |
| Product                      | <ul style="list-style-type: none"> <li>• <b>Product Strategy / Roadmap</b></li> <li>• <b>Story-Telling with Your Roadmaps</b></li> <li>• <b>Product Intake &amp; Prioritization Process Review</b></li> <li>• <b>Product Positioning Discussion / Workshop</b></li> <li>• <b>Competitive Intelligence Exercise</b></li> <li>• <b>Competitive Positioning / Pricing</b></li> </ul>  |



|                           |  |
|---------------------------|--|
|                           | <ul style="list-style-type: none"> <li>• Pricing Strategy: Pricing &amp; Packaging</li> <li>• Product Top 5 by Product Area</li> <li>• New Product Lifecycle Process</li> <li>• Engineering / Product Priorities - Product Backlog Prioritization</li> <li>• Market Requirements Analysis / Deepdive</li> <li>• BCG Product P&amp;L and Customer ROI Analysis (Dogs, Cash Cows, Questions Marks, Stars)</li> <li>• Data &amp; Analytics (mini IRB + SCRUM plan)</li> </ul> |
| Engineering               | <ul style="list-style-type: none"> <li>• Engineering SDLC</li> <li>• Waterfall vs. Agile; SCRUM vs. Kanban</li> <li>• Engineering/DevOps - Table Stakes</li> <li>• Engineering outsourcing</li> <li>• Engineering Velocity Allocation (Run the Engine / Tech Debt, Cust Commits / Backlog, Innovation, Security/Risk)</li> <li>• More self-service - the only model</li> </ul>   |
| Adv R&D / CTO Office      | <ul style="list-style-type: none"> <li>• Product Architecture Strategy</li> <li>• CTO Office Priorities (Strategics, Key Prod Initiatives)</li> <li>• Innovation Projects</li> <li>• Product Innovation MVP</li> </ul>   |
| Cloud Operations / DevOps | <ul style="list-style-type: none"> <li>• DevOps Strategy for a Global SaaS Footprint (by Region)</li> <li>• DevOps - Productizing Cloud Management</li> <li>• DevOps outsourcing</li> </ul>  |
| Security / Compliance     | <ul style="list-style-type: none"> <li>• Security Risk Register (ISMC)</li> <li>• Privacy/Security - Itemizing Capabilities of Security, Privacy, &amp; Governance</li> <li>• Privacy - GDPR Readiness Review</li> <li>• Security, Privacy, GRC Strategy - How to Package for Sales</li> </ul>   |
| Legal                     | <ul style="list-style-type: none"> <li>• Summary of contract terms - a guide for new customers</li> </ul>  |
| HR                        | <ul style="list-style-type: none"> <li>• Talent Assessment</li> <li>• Senior Team 360</li> <li>• HR Title Level Framework, Career Pathing, Staff vs. Market</li> <li>• HR Market Comp Analysis &amp; Equality Adjustments</li> <li>• Recruiting Analysis</li> <li>• Job Leveling &amp; Career Pathing</li> <li>• Critical Hires</li> <li>• HR Strategy with Building our Pools</li> </ul>  |

|             |   |
|-------------|---|
|             | <ul style="list-style-type: none"> <li>• <b>HR Linkedin Learning</b></li> </ul>   |
| Finance     | <ul style="list-style-type: none"> <li>• <b>KPI Dashboard by business function</b></li> <li>• <b>5yr Financial - Reflections &amp; Analysis</b></li> <li>• <b>Budgeting Process / Overview</b></li> <li>• <b>Use-of-Funds Workshop (Budget Analysis + Out-of-Cycle budget accelerators)</b></li> <li>• <b>Profitability (P&amp;L) by Customer</b></li> <li>• <b>Qtr Budget Asks</b></li> <li>• <b>Last Qtr Review &amp; Nexg Qtr Spend Adjustments</b></li> </ul> |
| Corp Dev    | <ul style="list-style-type: none"> <li>• <b>Corporate Development Strategy: 1+1=5 scenarios</b></li> <li>• <b>The Strategy for Strategics</b></li> <li>• <b>Corp Dev Strategy around Inorganic Growth (who could we acquire / merge with?)</b></li> </ul>   |
| Region / BU | <ul style="list-style-type: none"> <li>• <b>EU Business Review</b></li> <li>• <b>EU Operations – A P&amp;L View</b></li> <li>• <b>EU Region - Growth Accelerators</b></li> </ul>  |

Team-building events each quarter helped to break the ice before MBO and 360 exercises.

| Quarter | Theme                   | Team Events   |
|---------|-------------------------|---|
| 1Q16    | HighBar                 |   |
| 2Q16    | Leadership              | <a href="#">iFLY</a> , an-HR approved version of <i>skydiving</i>   |
| 3Q16    | Profitable Revenue      | <i>Zip-lining</i> at the <a href="#">Pumpkin Zip Tour</a> just outside Portland.  |
| 4Q16    | Business Metrics        | <i>Surfing</i> with <a href="#">Club Ed</a>   |
| 1Q17    | Identity Cloud          | <i>Drinking</i> at the <a href="#">Beauregard Vineyards</a> - they have been working the land in Bonny Doon, CA growing premium wine grapes.  |
| 2Q17    | Data Governance         | <i>Hiking</i> at <a href="#">Beacon Rock</a> , one of the most prominent and distinctive geological features in the Columbia River Gorge, and an 848-foot landmark that was once the core of a volcano. |
| 3Q17    | Identity Analytics      | <i>Canoeing</i> at <a href="#">Trillium Lake</a> - a lake situated 7.5 miles south-southwest of Mount Hood in the U.S. state of Oregon.   |
| 4Q17    | Identity of Things      | Sponsored <i>tour</i> to Zappos, the experts at <a href="#">delivering happiness</a> .  |
| 1Q18    | Organizational Strategy | <i>Kayaking</i> at Breakwater Cove at <a href="#">32 Cannery Row. in Monterey. CA</a> for a little kayaking fun   |
| 2Q18    | Offshore Leverage       | <i>Hiking</i> at the <a href="#">Salishan</a> on the coast of Oregon with access to a wonderful Lower Nature Conservancy Trail at <a href="#">Cascade Head</a> .  |
| 3Q18    | Market Development      | <i>River rafting</i> with the <a href="#">Seventh Mountain River Company</a> on the Deschutes.  |
| 4Q18    | Break Even Operations   | <a href="#">Whale Watching on the Riptide</a> .   |