Conversica 2020 - 2024 (5 years)

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The Transformation Thesis

When I was introduced to Conversica in August 2019, by the Savant Growth partnership, AI was well-understood by both Eric Filipek and his partner Javier Rojas because they had already made their first investment in Conversica back in 2013 (almost 12 years ago now).

Conversica was founded in 2007 by Ben Brigham (then called AutoFerret, starting as a Meta-Search Engine for vehicles) and then it launched its first Sales AI in 2009 (changing its name to AVA.ai). In 2014, it changed its name again to Conversica, a play on the word “conversation” with a brand that promoted the combination of humans and AI to accelerate revenue growth. This coincided with Savant Growth's private equity investment.

Most of the general public didn’t know what was happening at Google in the AI world back then. But as Conversica obtained its first PE investment (2013) and began to diversify its AI offerings, Deepmind (founded by Demis Hassabis, Shane Legg, and Mustafa Suleyman) was soon acquired by Google (2014); and the Google Brain team (created by Jeff Dean, Andrew Ng, and Greg Corrado) was experimenting on the use of large scale neural nets to improve core products like Search, YouTube, and Ads. When I entered the picture, taking the helm of Conversica, in October 2019, I had a little peek into the AI crystal ball (thanks to a long walk with Ron Bodkin). It was only 2 years after the transformer model was invented by the Google Brain team and introduced via a 2017 paper titled "Attention is All You Need". The Google DeepMind and Google Brain teams later merged in 2023.

“Oh my god, Eric. This company is MUCH bigger than you think it is.”, was my comment to Filipek back when he asked me to just take a look (summer of 2019). “I already think it’s big." said Filipek. "It’s the largest investment in our portfolio. But tell me more.”

Here’s what I saw back in August/September of 2019, when I looked at Conversica for the first time. I looked through three lens:

1. **Digital Transformation** continues to accelerate & put pressure on human workforces to automate
2. **AI** with traditional ML/DL is hard
3. **Operational excellence** requires a data-driven approach

Digital Transformation

When I ran the America's Digital Apps team at DXC ($1B, 7000 people), we were deploying over 1000 digital transformation projects every year. I knew that companies faced significant challenges when increasing their digital touch with their end-customers. The more digital touch a company created, the more challenges they faced servicing that digital touch, unless automation was increased to offset the human burden from the volume of consumer activity.

It was clear that automation in the back office was already taking off. Back in 2015 when I worked at DXC (then CSC), I had this idea of partnering with the emerging RPA companies: UIPath, Automation Anywhere, Blueprism, Kofax, and Pega. UIPath was just raising their seed funding then.

When I saw Conversica, four years later, I saw even more powerful automation, but in the front office. If UIPath could command hundreds of dollars per AI bot in the back office and create enterprise value of **$28B** at IPO a little over 5 years after it's seed round (2015), then Conversica could sell AI bots for thousands of dollars in the front office and achieve ***even more enterprise value***.

The idea of combining the two worlds of front-office and back-office intrigued me, creating an end-to-end intelligent automation company. We pitched this idea to PE when we fundraised for our Series D in late 2019 / early 2020.

Artificial Intelligence

Having achieved the fastest growing business within DXC at the helm of Big Data & Analytics (51% YoY, 4Q25, May 2015), we deployed over 700 big data projects annually, giving me a strong view of “AI” well before GenAI.

Half of my $250M line of business was dedicated to commercial AI use cases (engaging the Fortune 1000), and half to government AI use cases (engaging all the 3-letter agencies associated with protecting our homeland).

What I learned throughout my career with machine learning, deep learning, and now AI, was that ***model building, deployment, and maintenance is hard***. I knew that the minute you trained a model on the data it uses to take action, the model immediately started to decay. I knew that keeping models accurate was a required discipline.

The fact that Conversica had built a ML/DL pipeline that used all customer data to benefit every single account intrigued me. What also intrigued me was Conversica's ability to achieve a 98% accuracy level for the combination of interpreting the end-user AND taking the right next best action based upon that interpretation. The business had perfected the method by which the human-in-the-loop was deployed to maintain this high accuracy level, all in a scalable way.

I knew, based on my many “walk and talks” with people in the Google CTO office responsible for Applied AI, that something even more amazing was coming. With Conversica’s domain experience in ML/DL at scale, we could add in GenAI and truly advance the state of the art.

This was just at the time when OpenAI had just moved from a non-profit to a capped-profit model in order to raise the required capital to build AGI. The company was still < 200 people and GPT1 was still the foundational breakthrough, with a small version of GPT2 at the same parameter size (117M), all right when I started looking at Conversica.

But based on Google’s PaLM (now Gemini) the people I spoke to had big sights on how to evolve this technology beyond search, recommendations, and ads (e.g. healthcare, etc). Google’s BERT transformer was open sourced and available to us. So we started there, launching our first GenAI product in March 2020. We believed betting on Google would give us a competitive edge.

Operational Excellence

Two things came to mind when I dug into the business - 1) Profitable growth is hard, and 2) data doesn’t lie. Having just exited Janrain, a PE-backed business, there were many similarities between the two companies, with lots of "low hanging fruit". For example, we had 23 VPs at a company of about 230 people total, making up >25% of the costs in the business.

The business’ metrics made it clear that the team had achieved success, but through what I refer to as the “VC-backed” growth model vs. the “PE-backed” growth model. Namely, Conversica was growing “at all costs”.

A 40% YoY growth rate was truly impressive. However, every $1 of ARR cost the business $2 to acquire. Now, in my experience the VC-growth model can support unprofitable businesses. But, the PE-growth model is typically focused on profitability.

Conversica was approaching $50M in ARR, which is a great milestone, but it had done so with what I’ll call a lot of “singles”...for the most part:

- Single product offering: Sales AI
- Single customer segment: SMB

- Single industry vertical: Automotive
- Single region: North America
- Single G2M sales model: Inside sales

There is nothing wrong with this, if investors are ok with the heavily capitalized T2D3 growth model (triple, triple, double, double), to take a company from start to unicorn status. Again, this model typically requires significant growth capital. It felt like Conversica was actually past its T2D3 at $50M trying to get over $100M within two more years. Sure, in the AI space, this size of ARR with this growth can command significant EV (10-20x ARR). However, the business was missing one thing to continue to fuel this model - capital.

From an Operational Excellence perspective, the team had not run the business with a tight control on metrics typically important to Private Equity investors, at least with the larger, more successful funds.

This model would have been fine, if the company raised $150M of capital it had targeted before COVID hit. IF our Series D, had concluded with $150M, we might have been able to sustain SMB growth of 40% while adding in mid-market and enterprise into the revenue mix.

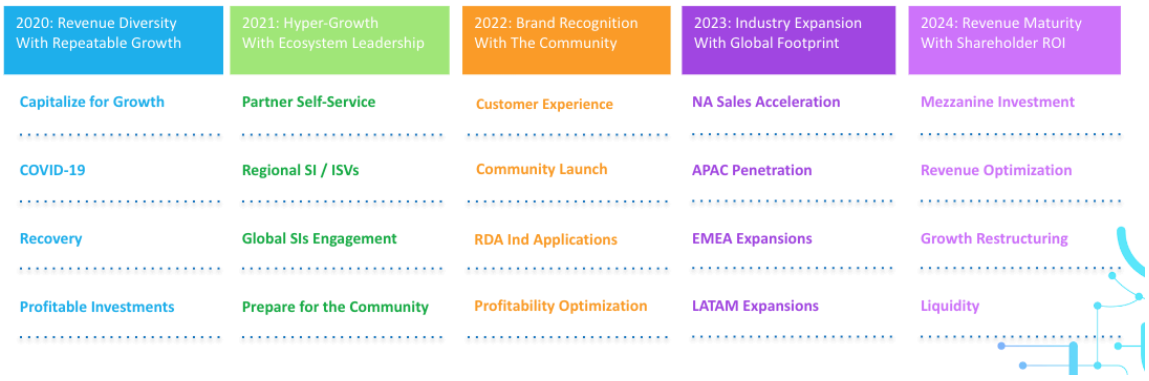
Fast forward, when we finally teased out about 400 metrics in the business, there were no places to hide. Now, I'm not advocating that you go to this level of detail, but when you have accurate and near-real-time data, it's much easier to map out the "from" -> "to" in the business, and drive change.

For us, we had been tasked with maintaining growth, achieving profitability, and reducing our capital raise from $150M to $20M. This drove the team to take unnatural acts from 2020 on.

So we set out on a 5-year journey as I show in the following, with many dos and don'ts worth passing on to others.

The Business Transformation

Fueling the Future Workforce, Today



Quarterly Themes

Year	Themes	Quarterly Themes
2019	Leadership	1. Strategic Plan
2020	Revenue Diversity	1. Capitalize for Growth 2. Response to COVID 3. EBITA Positive 4. Profitable Investments
2021	Hyper-Growth w/ Ecosystem Partners	1. Partner Self-Service (Product) 2. Regional SIs / ISVs 3. Global SIs 4. Prepare for Community
2022	Brand Recognition w/ Community	1. Customer Experience 2. Community Launch 3. Industry Applications 4. Profitability
2023	Industry Expansion Globally w/ Partners	1. NA Sales - Corp & Auto 2. APAC Expansion 3. EMEA Expansion 4. LATAM Expansion
2024	Revenue Maturity & Shareholder ROI	1. Mezzanine Investment (AVID) 2. Revenue Optimization (Cash Mgmt) 3. Growth Restructuring (focus on what is working) 4. Liquidity (M&A)
2025	Transition & Handoff	1. Graceful transition

2020 Revenue Diversity: How do we expand beyond all the “single” sources of revenue for the Company. In 2019, our profile was predominantly:

- One product = Sales AI
- One segment = SMB
- One vertical = Auto
- One G2M = Direct inside sales
- One region = USA

The idea for 2020, with or without COVID was:

- Expand into Marketing, and Customer Success AI use cases (we also tried Finance)
- Move upmarket to Mid-market and Enterprise
- Move into multiple industries outside of Auto (initially Tech, Telecom, Mfg, Sports)
- Move to a field sales team (from inside sales)
- Add an indirect channel to address SMB
- Support NA clients globally (land in NA & expand in ROW)

2021 Hyper-Growth with Ecosystem Partners: What do we need to do with the product to support a channel that manages multiple customers, and how do we enable channel partners (Resellers, OEM, Referral) to drive additional lift in the business? How do we get all the Auto CRM providers to OEM and/or resell Conversica? How do we get digital agencies to add Conversica to their Demandgen offerings? How do we get at least ONE Global SI, like Delloitte, to take us into Digital Transformation and/or CRM replatforming projects?

2022 Brand Recognition with Community: This was an effort to not only create user groups,and a customer advisory board but drive community sharing between customers and partners. This would require a company-wide effort to support with the purpose of getting customer/partners to talk about us more than we talk about ourselves (to get above the noise and educate customers more about whats possible). Specifics would require launching a community portal, hire and drive community sharing, and work to get as much of our internal customer content out on the web to make organic search explode.

2023 Industry Expansion Globally: This was meant to leverage global partners even more to expand in ROW countries. Investments would be made (MDF) to ignite partners established earlier in year 2. At a minimum, go to market with one large GSI, like Delliotte or Accenture, to deploy AI assistants/agents into revenue teams worldwide.

2024 Revenue Maturity & Shareholder ROI: With the proper GRR/DRR metrics and overall profitable ARR year-over-year growth, we would further capitalize for growth, optimizing the business for profitability and seeking a viable exit (Majority Recap, Strategic Acquisition, IPO).

Executive Team

Year	Themes	Executive Team
2019	Leadership	Inherited 14 direct reports (and 23 VPs total) 1. Ben Brigham, SVP, Founder 2. Michelle Johnson, VP, General Counsel and Secretary 3. Brian Kaminski, Chief Customer Officer 4. Jim Kaskade, CEO 5. Dr. Werner Koepf, SVP, Engineering 6. Arvinder Ludhiarich, General Manager, LATAM 7. Jason Lund, CFO 8. David Marod, SVP and GM, Automotive / Retail 9. Andrew McCraith, VP, Business & Corporate Development 10. Matt McLaughlin, SVP of Global Sales 11. John Pincott, General Manager, EMEA 12. Dr. Sid J. Reddy, Chief Scientist 13. Rashmi Vittal, CMO 14. Will Webb-Purkis, SVP, Product Management 15. Rafael Zamora, VP, Human Resources
2020	Revenue Diversity	3 exec changes (Legal, Eng, CFO) & 4 additional roles removed (Founder, GMx2, CSO): 9 reports 1. Yousef Fadli, Corporate Counsel 2. Brian Kaminski, Chief Customer Officer 3. Jim Kaskade, CEO & Board Member 4. Mark Jancola, CTO & VP Engineering 5. Peter Maloney, CFO 6. Andrew McCraith, VP, Business Development 7. Matt McLaughlin, SVP of Global Sales 8. Rashmi Vittal, CMO 9. Will Webb-Purkis, SVP, Product Management 10. Rafael Zamora, VP, Human Resources
2021	Hyper-Growth w/ Ecosystem Partners	7 exec changes (Sales, CFO, Indirect Sales, CS, Prodx3): 8 directs (2 interim) 1. Terrie Banuelos, VP Global Sales 2. Tim Driscoll, CFO 3. Erica Hansen, Interim Chief Customer Officer 4. Jim Kaskade, CEO & Board Member 5. Mark Jancola, Chief Development Officer 6. Josh Fox VP of Alliances: then Shawn Li, Head of Auto Alliances/Partnerships. Angela Nguyen, Head of Corp Alliances/Partnerships 7. Rashmi Vittal, CMO 8. Rafael Zamora, VP, Human Resources Note: Tried two other VPs of Product: Surendra Reddy (Jan-Feb ‘21) & Roya Azimi (Oct-Dec ‘21)
2022	Brand Recognition w/ Community	4 exec changes (CFO, CCO, CMO, Indirect Sales): 8 directs 1. Lewis Barr, GC & VP Legal 2. Terrie Banuelos, VP, Global Sales

		3. Mark Cuny, CFO 4. Ella Dillon, CCO 5. David Greenberg, CMO 6. Mark Jancola, CDO (Product & Engineering) 7. Zineb Laraki, VP Product 8. Jim Kaskade, CEO 9. Eron Sunando, VP, Global Alliances 10. Rafael Zamora, Chief People Officer
2023	Industry Expansion Globally w/ Partners	2 exec changes (direct+indirect Sales; CS): 7 directs 1. Lewis Barr, GC & VP Legal 2. David Greenberg, CMO 3. Mark Jancola, CDO (Product & Engineering) 4. Jim Kaskade, CEO 5. Peter Lockinger, CFO 6. Eron Sunando, CRO (Direct & Indirect) 7. Amy Oilman, SVP Customer Success 8. Rafael Zamora, Chief People Officer
2024	Revenue Maturity & Shareholder ROI	3 exec changes (Prod, Eng, Sales): 8 directs 1. Lewis Barr, GC & VP Legal 2. Todd Etchieson, CPO 3. David Greenberg, CMO 4. Vijay Jegan, CTO/VP Eng 5. Jim Kaskade, CEO 6. Peter Lockinger, CFO 7. Amy Oilman, SVP Customer Success 8. Jeff Pasco, VP Sales (Direct & Indirect) 9. Rafael Zamora, CHRO
2025	Transition	3 exec changes (CEO, GC, CHRO). Worked with BOD since July 2024, attempting to transition first to Kathleen Delaney, then Mike Gilson.

Top 3 Issues

Each quarter we focused the entire senior team on the “Top 3” issues of the business. These fed into each executive's “Top 5 MBOs” every quarter.

Quarter	Theme	Top 3 Company Issues
4Q19	Leadership	1. People: No inspiration, attrition high, no communications 2. G2M: Space not defined, Geos+Ind+Segs+Use-case not defined 3. Product Innovation: no valuation multiplier, feature deployment slow, team morale low, tech debt high
1Q20	Revenue Diversity with Repeatable Growth - Capitalize for Growth	1. Series D Capital Raise 2. Preparing for Rightsizing for COVID 3. International G2M Investments (wind down)
2Q20	Revenue Diversity with Repeatable Growth - Mid-Market & Enterprise (turned into COVID)	1. Issue 1: Retention/keeping employees motivated 2. Issue 2: Low velocity for end-to-end new product realization (need to create more, faster) 3. Issue 3: Sales Playbook that drives MM-ENT sales motion (direct focus)
3Q20	Revenue Diversity with Repeatable Growth - Vertical Diversification (turned into becoming EBITA Positive)	1. Issue 1: Drive customer outcomes and great customer experiences (Brian) 2. Issue 2: Demand Gen/Growth (Rashmi) 3. Issue 3: Partner Toolchain Product Offering (Will)
4Q20	Revenue Diversity with Repeatable Growth - Regional Expansion (turned into Profitable Investments only)	1. Issue 1: MM/ENT Product Requirements 2. Issue 2: HR Retention 3. Issue 3: Sales Reps Ramp & Productivity
1Q21	Hyper-Growth with Ecosystem Leadership - Partner Self-Service	1. Issue 1: Sales Productivity & Value Selling 2. Issue 2: Product Strategy & Roadmap 3. Issue 3: Systems of Record, Reporting, Forecasting
2Q21	Hyper-Growth with Ecosystem Leadership - Regional SI/ISVs	1. Issue 1: Sales Productivity 2. Issue 2: Product Roadmap & Strategy per PM 3. Issue 3: Enterprise Customer Lifecycle Definition & Execution
3Q21	Hyper-Growth with Ecosystem Leadership - Global SIs Engagement	1. Direct Sales Productivity 2. Indirect Bookings 3. System of Record
4Q21	Hyper-Growth with Ecosystem Leadership - Prepare for Community	1. Issue 1: MQL ->SQL (funnel issue) 2. Issue 2: Data Warehouse (getting one set of accurate data points) 3. Issue 3: People - Great Resignation
1Q22	Brand Recognition with	1. G2M (How to perfect 5 key pillars)

	The Community - Customer Experience	2. Demandgen (Marketing use of MA) 3. GenAI Production Issues
2Q22	Brand Recognition with The Community - Community Launch	1. Our own use of Conversica 2. CS Expansions 3. Direct Sales Funnel Drivers
3Q22	Brand Recognition with The Community - RDA Ind Applications	1. New Logo Creation 2. Churn Reducers 3. Base Expanders
4Q22	Brand Recognition with The Community - Profitability	1. Getting Chat Adopted 2. RevOps w/ Centralized Reporting 3. Step Functions to Profitability
1Q23	Industry Expansion with Global Footprint - NA	1. Date & Marry WOW for customers 2. CAB 3. Bottoms-up G2M (Past Alumni, Self-Service Trials)
2Q23	Industry Expansion with Global Footprint - APAC	1. Demandgen Performance 2. Conversations working Globally 3. Making Product Sticky (product churn reducers)
3Q23	Industry Expansion with Global Footprint - EMEA	1. Churn 2. Managed Services Needed (Conversica aaS) 3. 1:1 connection with the product (Pegasus)
4Q23	Industry Expansion with Global Footprint - LATAM	1. Bullseye / ICP 2. Outbound AI Demandgen 3. Salesforce / Deloitte G2M
1Q24	Revenue Maturity with Shareholder ROI - Mezzanine Investment	1. Chat - ensuring it's a competitive product 2. MAP (disrupt Marketing Automation) 3. Conversations as a Product
2Q24	Revenue Maturity with Shareholder ROI - Revenue Optimization	1. AI Accuracy 2. Ease of Product Deployment 3. Churn
3Q24	Revenue Maturity with Shareholder ROI - Growth Restructuring	1. Marquee Accounts Churn (CISCO) 2. Scaling GenAI (to ALL customers) 3. Language Support (Global Support)
4Q24	Revenue Maturity with Shareholder ROI - Liquidity	1. Salesforce Agentforce (how to respond) 2. Churn (how to get under control) 3. Path to $investment or $liquidity
1Q25	Transition	1. Renewing Existing Customers (#1) 2. Expanding Existing Customers (#2) 3. Capturing New MM/ENT Logos (#3)

Outside Expertise

We brought an outside perspective every quarter, for each of the senior team members / business functions.

Quarter	Theme	External Speakers
4Q19	Leadership	• Peter Wooster: Interim Chief Sales Officer, advisor
1Q20	Revenue Diversity with Repeatable Growth - Capitalize for Growth	• Innovation Summit (P&E): Dhruv Bansal and Roger Magoulas on how to move to a real-time framework (chat, messaging, voice)
2Q20	Revenue Diversity with Repeatable Growth - Mid-Market & Enterprise (turned into COVID)	• Hans Van Order: sales playbooks across the business during Covid19 times
3Q20	Revenue Diversity with Repeatable Growth - Vertical Diversification (turned into becoming EBITA Positive)	• Ashvin Vaidyanathan: on Customer Success "Moments of Truth"
4Q20	Revenue Diversity with Repeatable Growth - Regional Expansion (turned into Profitable Investments)	• Keith Carlson: on Partner Ecosystem Strategy (used to establish our 2021 Ecosystem strategy)
1Q21	Hyper-Growth with Ecosystem Leadership - Partner Self-Service	• Elissa Fink (BOD member): on marketing messaging (Message review, value propositions, by persona).
2Q21	Hyper-Growth with Ecosystem Leadership - Regional SI/ISVs	• Dr. Gustavo Grodnitzky: Multigenerational Workforce workshop.
3Q21	Hyper-Growth with Ecosystem Leadership - Global SIs Engagement	• Roman Pacewicz (CPO at AT&T): PLG Workshop
4Q21	Hyper-Growth with Ecosystem Leadership - Prepare for Community	• Cortado Group: G2M Workshop by Buyer Persona
1Q22	Brand Recognition with The Community - Customer Experience	• Kevin Colosimo: G2M Workshop w/ a Customer (Oracle)
2Q22	Brand Recognition with The Community - Community Launch	• Cunningham Collective: Branding / G2M Messaging Workshop
3Q22	Brand Recognition with	• Keith Carlson: Alliances Workshop

	The Community - RDA Ind Applications	
4Q22	Brand Recognition with The Community - Profitability	• Neeracha Taychakhoonavudh: CS Workshops • Alan Elliot: Sales Workshops
1Q23	Industry Expansion with Global Footprint - NA	• Tae Hea Nahm: Unlock the Growth Guide (G2M)
2Q23	Industry Expansion with Global Footprint - APAC	• Brian Solis: The New World of AI Needs Visionary Architects not Automators
3Q23	Industry Expansion with Global Footprint - EMEA	• Positioned2, Rajiv Parikh: Outsourcing all our Demandgen & using our own project with an Agency (P2)
4Q23	Industry Expansion with Global Footprint - LATAM	• Tony Owens: Strategic Planning Workshop
1Q24	Revenue Maturity with Shareholder ROI - Mezzanine Investment	• Surendra Reddy / 451Labs: GenAI Program Acceleration w/ Chat & Content Ingestion
2Q24	Revenue Maturity with Shareholder ROI - Revenue Optimization	• Patrick Kerwin: Sense of Urgency in the Org • Surendra Reddy: GenAI Roadmap
3Q24	Revenue Maturity with Shareholder ROI - Growth Restructuring	• Kathleen Delaney: GTM Workshop (Buyer Journey with Kofax)
4Q24	Revenue Maturity with Shareholder ROI - Liquidity	• Amr Awadallah: Disruption with RAG for AI • Kevin Burns/GCP Team: JV with Google on AI
1Q25	Transition	• David Ewart: Visa + Conversica. How the toughest vertical will adopt AI

Playbooks Details by Quarter

These are actual playbooks we deployed at every QBR. These always had buy-in by the entire senior team.

Quarter	Theme	Team Playbooks
4Q19	Leadership	1. Elements of the Strategic Plan 2. Vision, Mission, Values Workshop (a start) 3. Industry Trends / Influencers Workshop 4. Competitive SWOT Workshop 5. Category Leadership 6. Painted Pictures Exercise (All Business Functions) 7. Five Dysfunctions of a Team Exercise 8. Top 3 Issues Workshop 9. Product Innovation / Roadmap 10. Customer Success Analysis 11. Retail - Auto / SMB Sales 12. Corporate / MM-Ent Sales 13. Channel / Partner Sales 14. LATAM Market 15. European Market 16. Go-To-Market Strategy (Regions, Industries, Applications) 17. MBOs / OKRs 18. Team 360
1Q20	Revenue Diversity with Repeatable Growth - Capitalize for Growth	1. Innovation Workshop 2. Alliances Workshop 3. 2019 Financial Review 4. 2020 Bookings Plan Deep Dive 5. Series D - What Great Looks Like 6. 1Q20 Top “Nonsense” Workshop 7. Sales G2M - A Legal View 8. Lead Source Strategy & Plan (Campaigns to Support) 9. Reducing Bookings Risk in 2020 - OEM, Group, UK, SMB non-Auto 10. Targeted Accounts & Funnel Creation for MM/ENT Tech & Telco by Region 11. A Review of Pricing 12. Reducing Execution Risk in LATAM in 2020 13. Reducing Execution Risk in EMEA in 2020 14. Self-Service for CS 15. SOC Compliance GAP 16. Tools for Our Partners 17. IVAs are Applications - Product Realization Process 18. Talent Investment Assessment Action Plan 19. Global vs. Regional RACI 20. Executive Sponsorship Program 21. MBOs / OKRs 22. Team 360
2Q20	Revenue Diversity with Repeatable Growth - Mid-Market & Enterprise	1. Drive Performance During Covid19 Times - Workshop 2. Series D 3. 1Q Financial Review

	(turned into COVID)	4. 2020 Board-Approved Plan (full P&L) 5. Supporting 2020 Bookings Plan - Deep Dive 6. Top 3 Issues 7. Executive Sponsor Program Refresh 8. IVAs within the Conversica Business Workshop 9. Ideal Customer Profile (ICP) Workshop 10. From A Lead to Loyalty - Data is King and Access is Hard 11. Getting above the Covid19 Noise 12. Work From Home Guidelines - The Best of Silicon Valley's Tech Companies 13. MBOs / OKRs 14. Team 360
3Q20	Revenue Diversity with Repeatable Growth - Vertical Diversification (turned into becoming EBITA Positive)	1. Customer Moments of Truth 2. Q1 + Q2 Financial Review (Ops Review) 3. 2020-2024 5yr Pro Forma Plan Highlights (6+6+) 4. HC Plan for 2H 2020 and 2021 5. 2H and 2021 Key Financial Assumptions Deep Dive 6. Q3+Q4 Budget Deep Dive 7. Top 3 Issue Processing 8. Sales: Pricing & Packaging Redo 9. Alliances: 2021 Partner Readiness Workshop 10. Marketing: 3Q20 to 3Q21 - Funnel Contributions Workshop 11. HR: Building a recruiting pipeline 12. Engineering: Increasing Velocity 13. Product: Roadmap Commitment 14. Product: Application Review (by PMers Remotely) 15. Legal: A Privacy & Data Regulation Checklist 16. Industry G2M - A team Workshop 17. MBOs by Exec 18. Exec Team 360
4Q20	Revenue Diversity with Repeatable Growth - Regional Expansion (turned into Profitable Investments)	1. Half-Day Partner Ecosystem Workshop 2. Website Chat G2M Launch 3. Verticals, Segments, Direct/Indirect ARR Historic Analysis 4. 3Q20 & YTD Financial Results (BvA; Unit Economics) 5. 4Q20 Budget & FY2020 Proposal vs. BOD (w/ Unit Economics) 6. Key Budget Assumptions for 2021 7. 2021-2024 Pro-forma (Driven by Key Assumptions) 8. Top 3 Issues 9. Legal, Compliance - Data Privacy Matrix 10. Customer Success - Assets of our Customers 11. Sales - Stage Analysis & Workshop 12. Marketing - Verticals Analysis & Workshop 13. Engineering - A New Product Realization Process 14. Product - Toolchain Minimum Commitment by QTR 15. HR - Recruiting & Onboarding Staff 16. Pricing Workshop 17. Competition Workshop 18. MBOs by Exec 19. Exec Team 360

1Q21	Hyper-Growth with Ecosystem Leadership - Partner Self-Service	1. Messaging Workshop 2. Q4 / 2020 Financial Results (BvA) 3. 2021-4 Pro Forma Summary 4. 2021 Bookings Plan Review 5. 2021 Budget Plan Review 6. HC Assumptions Confirmation 7. Other Key Assumptions Confirmation 8. Top 3 Issues 9. Sales - Group Auto 10. Product - Pricing 11. Engineering - Blue Sky Investments 12. Alliances - Target Partners for 2021 13. CS - Demands from TEAM1 14. Legal - Going Global Requirements 15. HR - Talent Investment Summary -> SOAR Hiring 16. Training Desk Improvements Proposal 17. Truly getting to know TEAM1 (7 Qs) 18. MBOs by Exec 19. Exec Team 360
2Q21	Hyper-Growth with Ecosystem Leadership - Regional SI/ISVs	1. Maximizing Performance in a Multigenerational Workforce 2. Marketing Q1 Review & Q2 Plan 3. Embracing ABM to Accelerate Revenue Growth 4. Competition & Ecosystem Strategy 5. Top 3 Issues 6. AE Capacity Update & Plan 7. Product-Led-Growth Workshop 8. The Conversica SDR Opportunity 9. CS Disruptions: ABM Solution 10. Conversica Lifecycle Stages Workshop 11. Do we have the right messaging? 12. Q1 2021 Financial Results (BvA) 13. KPI Trends & Analysis & Discussion 14. 3+9 2021 Forecast & Associated Adjustments 15. MBOs by Exec 16. Exec Team 360
3Q21	Hyper-Growth with Ecosystem Leadership - Global SIs Engagement	1. PLG Strategy Workshop 2. Top 3 Issues 3. EQ Leadership 4. Q2 2021 Financial Results (BvA) 5. KPI Trends & Analysis & Discussion 6. 6+6 2021 Forecast & Associated Adjustments 7. Budget Tradeoff Discussions 8. Direct Sales Funnel Analysis (1H vs. 2H) 9. 2Q Marketing Review & 3Q Plan 10. Direct AE/SDR/Territory Performance for 1H21 11. Alliances Bottom-Up 2H Forecast 12. CS Assistant - Getting More Sales Traction 13. Industry Performance To Date, Plans Moving Forward 14. MBOs by Exec 15. Exec Team 360
4Q21	Hyper-Growth with	1. Painted Picture Review

	Ecosystem Leadership - Prepare for Community	2. Team Review of Painted Pictures (Amazon Reading) 3. Painted Picture Discussion 4. Getting to $100M Workshop 5. Cortado Group G2M Assessment Review 6. Marketing G2M Workshop - Buyer Persona 7. Direct G2M Workshop - MM/ENT 8. Indirect G2M Auto Workshop 9. Indirect G2M Corp Workshop 10. Customer Success Base G2M Workshop 11. Funnel Performance (an external view) 12. Q3 2021 Financial Results (BvA) - Our standard Ops Review 13. 9+3 2021 Forecast & Associated Adjustments 14. Unit Economics 15. KPI Trends & Analysis & Discussion 16. 2022 Plan Assumptions Review 17. A Product UI/UX Review - Future State of PLG 18. The SDR Dilemma (an internal review) 19. Building a Community 20. Top 3 Issues for 3Q 21. MBOs by Exec 22. Exec Team 360 / New Team Deep Dives
1Q22	Brand Recognition with The Community - Customer Experience	1. Oracle Future State & GAP 2. G2M Framework 3. G2M Workshop: Marketing 4. G2M Workshop: Sales 5. G2M Workshop: Delivery 6. G2M Workshop: Renewals 7. G2M Workshop: Expansions 8. Q4 / 2021 Flash Financial Results 9. Direct Sales 4Q Summary / 1Q Plan 10. Indirect Sales 4Q Summary / 1Q Plan 11. CS Renewals & Expansion 4Q Summary / 1Q Plan 12. 2022 Budget Review (final) 13. Position2 Demandgen Audit 14. Conversational Customer Success Workshop 15. GPT-X Demo 16. Conversational Commerce Workshop 17. Bonus Program / Variable Comps 18. System of Record / RevOps 19. Conversica on Conversica Update 20. Verticals Strategy 21. Themes we can defer to 2023 so we can do more in 2022 22. MBOs by Exec (9 x 15) 23. Exec Team 360
2Q22	Brand Recognition with The Community - Community Launch	1. Messaging Exercise: Cunningham Six Cs 2. Pricing Strategy (Aligning Direct, Indirect, CS) 3. 1Q22 Flash 4. 2022 Budget Update 5. Top 3 Issue Processing 6. Marketing: Lead Management 2.0 7. P&E: CoC

		8. Direct Sales: Pipeline Deals Go Silent After SQO 9. Direct Sales: Sales Slippage Issues 10. Indirect Sales: ISV Strategy 11. Customer Success: Integrated Auto Strategy 12. M&A: Janus Strategy Discussion 13. P&E: Post-Janus Engineering 14. P&E: Q2 Product Planning 15. MBOs by Exec (9 x 15) 16. Exec Team 360
3Q22	Brand Recognition with The Community - RDA Ind Applications	1. Alliances Strategy Workshop 2. 2Q22 Flash 3. Bill Lamm Readout for Auto 4. Top 3 for 2Q - A Readout (CoC, CS Expansion, Funnel Drivers) 5. Recession Proofing Messaging 6. Better (Disrupt) Together 7. Disrupt Leadgen Model 8. H2 Product Plan (w/ “What is needed for strategic partners to win”) 9. 6Sense Across All Mktg & Sales Skills (Working Lunch) 10. Holistic Training & Enablement 11. Global Strategy 12. TEAM1 Event at the Robert Mondavi Winery @2:30pm (bus leaves) 13. 2022 Budget Update 14. Budget Tradeoffs 15. Top 3 for 3Q 16. 2023 Strategic Planning Process 17. AI Regulatory Environment 18. Staff Throughput Enhancements 19. MBOs by Exec (9 x 15) 20. Exec Team 360
4Q22	Brand Recognition with The Community - Profitability	1. GRR Best Practices 2. DRR Best Practices 3. How to Success the Channel 4. Aligning Revenue Teams 5. Role Play, Selling to the CCO 6. The Problem Statement 7. Narrowing the ICP 8. Coexistance vs. Replacement strategy 9. Ideal seller profile 10. External Forces Affecting Conversica - Strategy Session 11. What Does Success Look Like in 2023? 12. Scaling Product Marketing 13. Product Launch Review 14. Auto Strategy 15. Product Investments 16. Chat 2.0 Pricing & Packaging 17. Centralized Reporting / RevOps 18. Operations Review (9+3) 19. Strategic Planning Process Timeline

		20. Step Functions to Profitability 21. 3Q Top3 Review -> 4Q Top3 Prioritization 22. MBOs by Exec (9 x 15) 23. Exec Team 360
1Q23	Industry Expansion with Global Footprint - NA	1. Half-Day Workshop: Unlock Growth Guide 2. Top KPIs Exercise 3. 2023 Plan Review 4. 2023 Funnel Model, Demand Gen Plan 5. Customer Insights & Ops Strategy 6. RKO & CAB Planning 7. Workshop 1: Chatbot 1.0 is Dead w/ our NG Chat 8. Workshop 2: Disrupt SDR Model + Bottom's up GTM 9. Workshop 3: Enterprise (Corp & Auto Top Acnts) 10. Workshop 4: Expand Base's Use of RDA Skills 11. Workshop 5: Conversica on Conversica - CoC 12. Product & Engineering Plan (PRB Proxy) 13. New Website Tour / Chat Messaging Test 14. Direct Sales Win Plan (AE/SDR Pipeline Analysis) 15. Indirect Sales Win Plan (Plan by Partner Review) 16. CS Renewal & Expansion Bookings Plan (by CSM) 17. Operations Review (4Q / 2022 Books Closed) 18. Finalize Comp Plans 19. 1Q23 MBOs 20. TEAM1 360
2Q23	Industry Expansion with Global Footprint - APAC	1. Thought Leadership 2. Chat Engineering Deep Dive & Readiness (Panel Discussion) 3. Pricing & Packaging & ICP 4. Q2 Forecast Review (Direct Sales, Indirect Sales, CS) 5. Company Strategy: Current & Future State to Win Discussion (Chat vs. Full Solution; NA vs. Intl; Auto vs. Enterprise; Direct vs. Indirect; PLG vs. PS; Base vs. New, etc.) 6. Morning Event (Discussion: Team Backfills / Upgrades - A Review) 7. SDR Performance & Strategy 8. Auto Investment Deep Dive (Retain & Growth; Sonic+) 9. Conversation Design Deep Dive: Roadmap & Resource Ask 10. Making the Product More Sticky in the Base (Acting on Churn Analysis) 11. Product Strategy & Investment Trade-Offs 12. Pricing & Packaging & ICP V2 13. 1Q23 MBOs 14. Operations Review 15. Budget Asks / Cash Flow BE / Tradeoffs 16. TEAM1 360
3Q23	Industry Expansion with Global Footprint - EMEA	1. Pipeline Generation Review (Q1/Q2 vs. 2H Requirements) 2. Position2 Conversica SaaS Project Update 3. The Bullseye 4. Churn is the Theme

		5. Deloitte Project Deep Dive 6. Sonic Expansion (Deferred) 7. Support Offerings 8. Partner Admin Services (offshore w/ ISSICO) 9. Partner 2H Forecast (moved) 10. Chat 2.0 GTM / Business Case / Roadmap* 11. Conversation Roadmap 12. Foreign Language Support 13. Pegasus 2H (using managed services) 14. Pricing & Packaging 2.0 15. Operations Review (Flash) 16. How to Bridge Cash GAP 17. 3Q23 MBOs 18. TEAM1 360
4Q23	Industry Expansion with Global Footprint - LATAM	1. Strategic Planning Workshop 2. Bullseye Refresh 3. 4Q23 & 1Q24 Renewals Analysis 4. CS Customer Segmentation (by CSM, by segment) 5. Direct Sales 4Q23 Pipeline Analysis + Strategy 6. Indirect Sales 4Q23 Pipeline Analysis + Strategy 7. Leadgen Analysis (Position2 OGW & QuickStart Programs) 8. Deloitte Program Plan Detailed Review 9. Salesforce GTM Plan Detailed Review 10. High-Value Use Cases: A Final Review 11. Support/Services Packaging: A Final Review 12. Professional Services G2M Strategy 13. Product Roadmap Discussion 14. How to help Sales Sell More: Pricing & Packaging, PODs, Verticals 15. Operations Review 16. 3Q23 MBOs 17. TEAM1 360
1Q24	Revenue Maturity with Shareholder ROI - Mezzanine Investment	1. Chat Program Review 2. The AI Technology Marketplace - An ecosystem brainstorm 3. Part 1: 2024 Strategy Session (Three Focus Areas at a Corporate Level) 4. Marketing Campaign & Demandgen 4Q and 2023 EoY Summary 5. Direct & Indirect Sales 4Q and 2023 EoY Reflections 6. Churn/Downsell 4Q and 2023 EoY Reflections 7. P&E 4Q and 2023 Overall Product Delivery Summary 8. Operations Review - 4Q Flash 9. Budget Finalization Review 10. 1Q24 Product Plan 11. PM Workshop: A Identifying the top 3 per Area 12. Indirect Program Futures 13. Gross Retention to 90% 14. Offshoring: A Company-wide Strategy 15. Top 3 Issues for 1Q24 16. Part 2: 2024 Strategy Session (Three Focus Areas at a Corporate Level)

		17. 1Q24 MBOs
2Q24	Revenue Maturity with Shareholder ROI - Revenue Optimization	1. Sense of Urgency @ Conversica Using MBTI 2. Top 3 Issues Workshop for Conversica 3. Company Strategy Workshop 4. GenAI & Our Roadmap Discussion 5. Proposed Strategic Product Strategy (output of Product Offsite) 6. Conversica Marketecture: Requirement & Investment Areas 7. Offshoring Strategy (P&E Organization) 8. Churn by Account for Q2 & Q3 (HVUC Update) 9. Churn Playbooks (HVUC and more) 10. 1Q24 Results & 2Q Budget 11. Budget Asks / Tradeoffs 12. Leadgen Q2-4 13. How to get EVERY AE overachieving 14. How much investment/success expected by partner (Bookings & Churn) 15. PS Offerings 16. Company Strategy Follow-up 17. 2Q24 MBOs 18. Team 360
3Q24	Revenue Maturity with Shareholder ROI - Growth Restructuring	1. GTM @ Conversica 2. Q2/1H Performance & 2H Forecast (Ops Review) 3. RevOps Roadmap 4. Top 3 Issues Workshop for Conversica 5. Conversica & Cisco Call (A Churn Debrief) 6. FOCUS Workshop with Exec Team: How to place big bets? 7. GenAI-centric Architecture / Marketecture 8. GenAI Roadmap 9. Language Support & Global Expansion 10. Competitive Strategy Workshop 11. Top 10 Customer Review (HVUC) 12. Quarterly Call with Lithia's Senior RMOs (Save Play) 13. SFMC Program Status & Plan 14. 2H Pipeline by AE; by Partner WITH a Plan 15. 2H Pipeline / Churn Gap Plan Workshop Involving ALL Functions 16. Rightsizing to Revenue: Get to Profitability (A PE-Playbook) 17. Capitalizing To Win: Get to Growth (A VC-Playbook) 18. 3Q24 MBOs 19. Team 360
4Q24	Revenue Maturity with Shareholder ROI - Liquidity	1. Disruption with RAG (with Vectara) 2. Google AI Joint Venture 3. Operating Review (3Q24 Results & 4Q24 Forecast) 4. Churn Review (Past predicts the future?) 5. Enterprise Account Management Excellence (Journey Mapping) 6. How Do We Overlay with Sales Strategic Account Management

		7. Auto Strategy 8. A Morning walk along the Cowell-Purisima Trail (9-11) 9. Product Roadmap (4Q) 10. Top-Down vs Bottom-Up vs Current Roadmap 11. Hackathon outcomes: Go forward strategy with or without AgentForce 12. Budgeting Cycle Kickoff 13. Strategic Planning Process 14. Preparation for a M&A Process 15. MBOs 16. Exec Team 360: Changing it Up
1Q25	Transition	1. 2024 Churn Analysis by Segment 2. 2024 Review of Churn Reasons 3. 1H25 Top Renewals Overview 4. Customer Success Strategy 5. 1Q25 Financial Objectives 6. Execution Plan by Department 7. Customer Base Workshop (Customer Journey Mapping) 8. 2024 AE Bookings Review 9. AE QBRs 10. Expansion Playbooks 11. High-Value Use Cases Deployment in the Base 12. Enterprise Account Targets 13. AE & CS Compensation Programs 14. Product & Engineering 1Q25 Roadmap Review (PLG)
2Q25	Handoff	1. Ella Digital (Partner View) 2. A New Strategic View 3. Leapfroggers 4. Roadmap (Now, Next, Later) 5. Industry Focus: Sports & Entertainment(G2M / Competition) 6. Industry Focus: Auto (G2M / Competition) 7. Industry Focus: Technology (G2M / Competition) 8. Fresh Positioning / GTM Approach 9. Aligning on Revenue Motions: Retain, Expand, New Logo 10. Retention Analysis for Q2-Q4 (Detailed Model) 11. Direct Corporate New Logo & Expansion Pipeline Review 12. Direct Auto New Logo & Expansion Pipeline New 13. An Adaptive Conversations Experiment 14. Technology Futures (Voice, Messaging) 15. Employee Retention 16. 1Q25 Flash 17. 2Q/ROY 2025 Pipeline/Forecast 18. Revised 2025 Plan

422 playbooks deployed over 23 quarterly business reviews.

Quarter	Number of Playbooks
4Q19	18
1Q20	22
2Q20	14
3Q20	18
4Q20	19
1Q21	19
2Q21	16
3Q21	15
4Q21	22
1Q22	23
2Q22	16
3Q22	20
4Q22	23
1Q23	20
2Q23	16
3Q23	18
4Q23	17
1Q24	17
2Q24	18
3Q24	19
4Q24	16
1Q25	14
2Q25	18
Total	**422**

Playbooks By Business Function

Business Function	Playbook
CEO: Management System, Exec Team, Strategy	1. Elements of the Strategic Plan 2. Vision, Mission, Values Workshop (a start) 3. Industry Trends / Influencers Workshop 4. Painted Pictures Exercise (All Business Functions) 5. Five Dysfunctions of a Team Exercise 6. Top 3 Issues Workshop 7. Top “Nonsense” Workshop 8. Using your own Product 9. Driving Performance During Fundraising 10. EQ Leadership 11. Global Strategy 12. External Forces Affecting Conversica - Strategy Session 13. What Does Success Look Like End of Next Year? 14. Unlock Growth Guide 15. Strategics GTM Plan Detailed Review 16. The AI Technology Marketplace - An ecosystem brainstorm 17. Offshoring: A Company-wide Strategy 18. FOCUS Workshop with Exec Team: How to place big bets? 19. Execution Plan by Department 20. Leapfroggers - Getting well ahead of our peers
Direct Sales / SEs	1. AE QBRs 2. Retail - Auto / SMB Sales 3. Corporate / MM-Ent Sales 4. Reducing Bookings Risk 5. Targeted Accounts & Funnel Creation by Segment / Industry 6. Verticals Strategy 7. Expansion within the Base 8. Sales: Pricing & Packaging Redo 9. Stage Analysis & Workshop 10. AE Capacity Update & Plan 11. The SDR Opportunity 12. Direct Sales Funnel Analysis 13. Direct AE/SDR/Territory Performance 14. Industry Performance 15. The SDR Dilemma 16. Direct Sales: Pipeline Deals Go Silent After SQO 17. Direct Sales: Sales Slippage Issues 18. The Problem Statement 19. Narrowing the ICP 20. Ideal seller profile 21. How to help Sales Sell More: Pricing & Packaging, PODs, Verticals 22. How to get EVERY AE overachieving 23. Enterprise Account Management Excellence (Journey Mapping) 24. AE (vs. CS) Comp Plans 25. Enterprise Account Targets
Indirect Sales / Alliances / Partners /	1. Channel / Partner Sales - Selecting the IPP 2. Alliances Strategy Workshop

Channel	3. Tools for Our Partners 4. Partner Readiness Workshop 5. Partner Ecosystem Workshop 6. Target Partners for the year 7. Indirect Sales: ISV Strategy 8. Partner Admin Services (offshore w/ ISSICO) 9. How much investment/success expected by partner (Bookings & Churn) 10. Partner Pipeline Review/Planning
Marketing (Demand Gen, Prod Mrktg, PR)	**1.** Competitive SWOT / Strategy Workshop 2. Ecosystem Strategy 3. Category Leadership 4. Go-To-Market Strategy (Regions, Industries, Applications) 5. Lead Source Strategy & Plan (Campaigns to Support) 6. From A Lead to Loyalty - Data is King and Access is Hard 7. Ideal Customer Profile (ICP) Workshop 8. Funnel Contributions Workshop 9. Industry G2M - A team Workshop 10. Verticals Analysis & Workshop 11. Messaging Workshop 12. Marketing Review & Plan 13. Customer Success Base G2M Workshop 14. Demandgen Audit 15. Pricing Strategy (Aligning Direct, Indirect, CS) 16. Recession Proofing Messaging 17. Better (Disrupt) Together 18. Holistic Training & Enablement 19. Scaling Product Marketing 20. RKO, User Groups, & CAB Planning 21. Thought Leadership 22. SDR Performance & Strategy 23. The Bullseye 24. High-Value Use Cases: A Final Review
Customer Success	1. Customer Success Analysis by Customer Bottom's Up 2. CS Customer Segmentation (by CSM, by segment) 3. Self-Service for CS 4. Executive Sponsorship Program 5. Customer Moments of Truth 6. Key Assets of our Customers 7. Company Lifecycle Stages Workshop 8. Building a Community 9. Customer Future State & GAP Analysis 10. GRR Best Practices 11. DRR Best Practices 12. How to Success the Channel 13. Aligning Revenue Teams 14. Role Play, Selling to the CCO 15. Making the Product More Sticky in the Base (Acting on Churn Analysis) 16. Churn Analysis (Reasons) 17. Churn Playbooks (HVUC and more) 18. Top 10 Customers Review 19. How Do We Overlay CS with Sales Strategic Account

	Management 20. Churned Customer Exec Team DeBrief 21. Renwal Customer Exec Team Discussion (Save Play) 22. Prior Year Churn Analysis by Segment 23. Prior Year Review of Churn Reasons 24. First Half Top Renewals Overview 25. Customer Base Workshop (Journey Mapping) 26. High-Value Use Cases Deployment in the Base
Technical / Customer Support	1. Support Offerings: Pricing & Packaging 2. Support Ticket Analysis & Prioritization
Professional Services	1. Professional Services G2M Strategy 2. PS Offerings: Pricing & Packaging
Product Management	1. Product Innovation / Roadmap 2. A Review of Pricing 3. Applications - Product Realization Process 4. Roadmap Commitment 5. Application Business Review (by PMers) 6. A New Product Realization Process 7. Internal Toolchain Minimum Commitment 8. Product-Led-Growth Workshop 9. A Product UI/UX Review - Future State of PLG 10. P&E: Customer Zero (using your own product) 11. Product Launch Process Review 12. Product Strategy & Investment Trade-Offs 13. By PM Workshop: A Identifying the top 3 per Product Area 14. PLG Review (Cust, Partner, by Dept)
Engineering	1. Innovation Workshop 2. Increasing Velocity 3. Blue Sky Investments 4. Platform Marketecture: Requirement & Investment Areas 5. Hackathon outcomes
Cloud Operations / DevSecOps	1. Reducing Cloud Spend 2. Global Coverage
Legal / Security / Compliance	1. Sales G2M - A Legal View 2. SOC Compliance GAP 3. A Privacy & Data Regulation Checklist 4. Legal, Compliance - Data Privacy Matrix 5. Going Global Requirements 6. AI Regulatory Environment
HR / People	1. MBOs / OKRs 2. Team 360 3. Talent Investment Assessment Action Plan 4. Work From Home Guidelines - The Best of Silicon Valley's Tech

	Companies 5. Getting above the Covid19 Noise 6. HC Planning 7. Building a recruiting pipeline 8. Recruiting & Onboarding Staff 9. SOAR Hiring 10. Maximizing Performance in a Multigenerational Workforce 11. Bonus Program / Variable Comps 12. Staff Throughput Enhancements 13. Sense of Urgency @ Conversica Using MBTI
Finance	1. Operations Review (Key Metrics / Trends, Actuals vs Plan, Fcst) 2. Budget Tradeoffs 3. Bookings Plan Deep Dive (Direct, Indirect, CS) 4. 5yr Pro Forma Plan Highlights 5. Key Financial Assumptions Deep Dive 6. KPI Trends & Analysis & Discussion 7. Verticals, Segments, Direct/Indirect ARR Historic Analysis 8. YTD Financial Results with Unit Economics 9. Pro-forma (Driven by Key Assumptions) 10. [A+F] Forecast & Associated Adjustments 11. Unit Economics 12. Centralized Reporting / RevOps 13. Step Functions to Profitability 14. How to Bridge Cash GAP 15. RevOps Roadmap 16. Rightsizing to Revenue: Get to Profitability (A PE-Playbook) 17. Capitalizing To Win: Get to Growth (A VC-Playbook)
International	1. LATAM, EMEA, APAC Market Analysis 2. Reducing Execution Risk in LATAM, EMEA, APAC 3. Global vs. Regional RACI
Corp Dev	1. M&A: Strategy Discussion (1+1=5) 2. Preparation for a M&A Process

171 “design thinking” workshops applied over 14 discrete functions (“Direct Sales / SEs”, etc) + generally across the entire leadership team (“CEO”).

Business Function	**Number of Playbooks**
CEO: Management System, Exec Team, Strategy	20
Direct Sales / SEs	25
Indirect Sales / Alliances / Partners / Channel	10
Marketing (Demand Gen, Prod Mrktg, PR)	24
Customer Success	26
Technical / Customer Support	2
Professional Services	2
Product Management	14
Engineering	5
Cloud Operations / DevSecOps	2
Legal / Security / Compliance	6
HR / People	13
Finance	17
International	3
Corp Dev	2
Total	**171**

Team Building - Locations of our QBRs

Quarter	Theme	Team Events
4Q19	Leadership	GSVLabs: 955 Campus Dr #110, San Mateo, CA 94403
1Q20	Revenue Diversity with Repeatable Growth - Capitalize for Growth	The Sleeping Lady Mountain Resort, 7375 Icicle Road, Leavenworth, WA 98826
2Q20	Revenue Diversity with Repeatable Growth - Mid-Market & Enterprise (turned into COVID)	Remote: 100% on Zoom (COVID)
3Q20	Revenue Diversity with Repeatable Growth - Vertical Diversification (turned into becoming EBITA Positive)	Costanoa Lodge, Pescadero, CA
4Q20	Revenue Diversity with Repeatable Growth - Regional Expansion (turned into Profitable Investments)	Healdsburg, Sonoma, CA
1Q21	Hyper-Growth with Ecosystem Leadership - Partner Self-Service	100% Remote via Zoom (Post-COVID)
2Q21	Hyper-Growth with Ecosystem Leadership - Regional SI/ISVs	100% Remote via Zoom (Post-COVID)
3Q21	Hyper-Growth with Ecosystem Leadership - Global SIs Engagement	Olema House, Point Reyes, CA
4Q21	Hyper-Growth with Ecosystem Leadership - Prepare for Community	Friday Harbor House, San Juan Island, WA
1Q22	Brand Recognition with The Community - Customer Experience	Chaminade Resort & Spa, Santa Cruz, CA
2Q22	Brand Recognition with The Community - Community Launch	L'Auberge, Del Mar, CA
3Q22	Brand Recognition with The Community - RDA Ind Applications	HARMON GUEST HOUSE, Healdsburg, CA

4Q22	Brand Recognition with The Community - Profitability	Salishan Coastal Lodge, Gleneden Beach, Oregon
1Q23	Industry Expansion with Global Footprint - NA	HQ In-office (Foster City, Seattle, Bellingham)
2Q23	Industry Expansion with Global Footprint - APAC	Seattle office, WA
3Q23	Industry Expansion with Global Footprint - EMEA	Oceano Hotel, Half Moon Bay, CA
4Q23	Industry Expansion with Global Footprint - LATAM	Hotel Healdsburg, Healdsburg CA
1Q24	Revenue Maturity with Shareholder ROI - Mezzanine Investment	The Lodge at Bodega Bay, Sonoma Coast, CA
2Q24	Revenue Maturity with Shareholder ROI - Revenue Optimization	Columbia Gorge Hotel, Oregon
3Q24	Revenue Maturity with Shareholder ROI - Growth Restructuring	Hyatt Regency Mission Bay, San Diego, CA
4Q24	Revenue Maturity with Shareholder ROI - Liquidity	Beach House Hotel, Half Moon Bay, CA
1Q25	Transition	HQ, San Mateo, CA
2Q25	Handoff	Offices of RSM, SF, CA

Team-building - Events by quarter

Quarter	Theme	Team Events
4Q19	Leadership	• Five Dysfunctions of a Team Exercise
1Q20	Revenue Diversity with Repeatable Growth - Capitalize for Growth	• SnowShoeing in the Cascades: Icicle River Trail s
2Q20	Revenue Diversity with Repeatable Growth - Mid-Market & Enterprise (turned into COVID)	• COVID at home highly encouraged walk, run, or whatever physical activity
3Q20	Revenue Diversity with Repeatable Growth - Vertical Diversification (turned into becoming EBITA Positive)	• A COVID Safe Walk on the Beach (Pescadero)
4Q20	Revenue Diversity with Repeatable Growth - Regional Expansion (turned into Profitable Investments)	• A COVID Safe Safari Tour
1Q21	Hyper-Growth with Ecosystem Leadership - Partner Self-Service	• Post-COVID at home highly encouraged walk, run, or whatever physical activity
2Q21	Hyper-Growth with Ecosystem Leadership - Regional SI/ISVs	• Post-COVID at home highly encouraged walk, run, or whatever physical activity
3Q21	Hyper-Growth with Ecosystem Leadership - Global SIs Engagement	• Tomales Bay Kayaking
4Q21	Hyper-Growth with Ecosystem Leadership - Prepare for Community	• Whale Watching, San Juan Islands WA
1Q22	Brand Recognition with The Community - Customer Experience	• Chaminade Synergy team building exercises on the rope
2Q22	Brand Recognition with The Community - Community Launch	• San Diego IFLY
3Q22	Brand Recognition with The Community - RDA Ind Applications	• Dinner at Robert Mondavi Winery

4Q22	Brand Recognition with The Community - Profitability	• Salishan's on-site Aerial Park
1Q23	Industry Expansion with Global Footprint - NA	• Local Office Walk & Talks
2Q23	Industry Expansion with Global Footprint - APAC	• Bainbridge Island Ferry and Walk to Pegasus
3Q23	Industry Expansion with Global Footprint - EMEA	• Sailing out of Richmond (Tradewinds) to Riggers Loft
4Q23	Industry Expansion with Global Footprint - LATAM	• Dry Creek Kitchen in Healdsburg
1Q24	Revenue Maturity with Shareholder ROI - Mezzanine Investment	• Bodega Bay Tasting Room
2Q24	Revenue Maturity with Shareholder ROI - Revenue Optimization	• Scavenger Hunt in Columbia Gorge
3Q24	Revenue Maturity with Shareholder ROI - Growth Restructuring	• Kayaking in La Jolla
4Q24	Revenue Maturity with Shareholder ROI - Liquidity	• Morning walk along the Cowell-Purisima Trail
1Q25	Transition	• Porterhouse Dinner Only
2Q25	Handoff	• Team Epic Steakhouse Only