



Driven by Insights
Delivered from Experience

Alight Final Readout

January 6, 2022



Executive Summary

Alight has done significant work in the 3 areas below, and SBI has compared work to benchmark and made 10 key recommendations

Account Segmentation

1. Connect Account Potential work to PtB and created logic for PtB model
2. Adjusted potential by adding weighting to allocate accounts priority and ownership
3. Leveraged Account Seg work to inform Equitable Territory design

Account Coverage

4. Adjust the coverage model for Strategic Accounts into Key, Strategic, Delivery Executive Owned
5. Migrate product specialists into Overlay or Health roles and improve future M&A seller integration away from individual solution sales
6. Utilize centralized sales team to improve account management, lead generation and net new sales
7. Improve ramp speed and attrition across teams through seller enablement

Territory Planning

8. Leverage 'PtB weighted potential' during the territory assignment process to create equitable territories
9. Use guiding principles to allocate accounts to the correct owners (i.e., strategic vs. key)
10. Create clear primary and secondary account ownership to enable cross-sell of the base

Alight's existing segmentation utilizes multiple leading best practices, but lacks wider adoption within the selling organization

Assessment Area		Description/Purpose	Findings	Gap/Gulf
1	Account Potential	Determines the cross-sell potential of your customers using an analytical approach	- Multiple attempts to determine account potential have been undertaken over the last 2 years - Account Potential calculations are aligned to best practice, but lack adoption	
2	Propensity to Buy	Using firmographic factors and past performance, determines the propensity to buy by product for each account / prospect	No formal undertaking to build Propensity to Buy	
3	Ideal Customer Profiles	Creates data-driven Customer Profiles informed by Propensity to Buy and market behavior	Sellers are familiar with their Ideal Customers depending on the solution they sell, though no formal enablement is available	
4	Prioritized Account Lists inform Territories	Lists accounts based on priority of importance and upside that sellers should actively target.	- Accounts stratified based on # of Eligible Employees - Territories are not developed based on \$ Potential by product	
5	Segmentation informs Org. Design & is aligned to buyers	Determines the right roles, number of headcount, and organizational chart required to make your number.	- Multiple re-orgs within past two years have left sellers confused on how to engage their accounts - Inside-out approach to One-Alight not necessarily aligned to buyer preferences	
6	Sales Motions aligned to market potential and buyer characteristics	Sellers are executing defined sales motions to retain, acquire and develop accounts based on a defined account	- Sellers, particularly those with lesser tenure, are lacking the enablement on how to bring the right solution at the right time - Compensation and ROE misaligned to cross-sell in some cases	

Alight has an opportunity to leverage account potential and propensity to buy to improve FY22 Coverage Design

Assessment Area		Description/Purpose	Findings	Gap/Gulf
1	Sales activities informed by account potential, propensity and buyer preferences	Sellers are targeting defined accounts & prospects based on a combination of potential and propensity	- Interview feedback confirmed that Large Market & Mid-Market Health sellers sell the entire health product suite Solution Sellers overlap with these teams in product and market	
2	Bottom-up Potential Analysis	Primary quota carrier headcount allocation based on account coverage and potential revenue	Alight has ~\$1.6B of potential in its existing customer base. If Alight can implement account segmentation it can achieve its targeted bookings of \$414M from the base	
3	Capacity Model by Role	Number of accounts that sellers manage based on factors derived from potential	- There is a gap in sales owners identified in the system of record (i.e. SFDC) which has a strong potential for inefficient productivity - Professional Services team indicated having 3x more accounts than they could handle, which aligns with sales culture being reactive from interviews	
4	Coverage Plan by Segment	Cover the market potential with the most cost-effective sales channels with the intent on overserving your top segment	Given 50% of sellers have attained <50% of quota year over year along with a double comping mechanism, there is an opportunity to improve capital efficiency of the GTM function	



75% of Best Practice



50% of Best Practice



25% of Best Practice



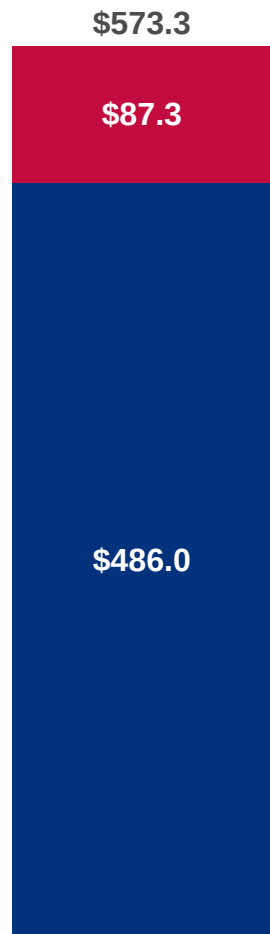
0% of Best Practice

Current territory design relies on multiple manual levels of review with disparate datasets across sales leaders and managers

Assessment Area		Description	Findings	Gap/Gulf
1	Territory Design Methodology	Methodology and design principles are developed across the business and built using multiple data sources	Territory design and account allocation methodology is reliant on manual processes and disparate in approach depending on Sales Manager	
2	Workload Capacity Models	Sellers have been surveyed and past performance assessed to understand the number of accounts a seller can effectively carry	No formal repository for seller capacity by segment and territory	
3	Territory Potential	Account Segmentation and prioritization data is used to inform territory design based on past performance and addressable whitespace	Current territory design does not integrate product specific white-space across the organization (some managers may develop their own whitespace calculations)	
4	Specific Account Assignment by Territory	Accounts are assigned to primary and secondary owners with relevant insight on the highest potential opportunities	- Accounts are geographically distributed from a manager-developed list - Territories are geographically based and not distributed equitably based on \$ potential	
5	Headcount Modeled with Multiple Approaches	Sales management has used prior years productivity and bottom-up analysis to determine the number of sellers necessary to make targets	Some existing segmentation work has integrated headcount modelling aligned to best-practice, unknown adoption across the organization	
6	Communication Planning	Territories are assigned with limited disruption to current deals, sellers understand the design process and feel their insight has been incorporated	Multiple territory changes have left sellers frustrated and feeling unable to meet their quotas	

Alight has the potential to miss FY22 bookings target by \$87M due to attrition, ramp speed and hiring time

Base Case



FY22 Forecasted Bookings

Practices	FY22 Target	FY22 Projected Bookings	Delta (%)
ABG	\$12.5	\$14.0	12%
Con Exp.	\$17.4	\$18.4	6%
Strategic Accounts	\$251.0	\$221.0	(14%)
Market Makers	\$38.0	\$37.4	(2%)
LM Health	\$28.5	\$15.1	(89%)
MM Health	\$28.1	\$21.9	(28%)
Payroll	\$19.5	\$15.1	(29%)
Wealth	\$12.6	\$10.9	(16%)
Navigation	\$5.0	\$1.3	(285%)
DVS	\$3.6	\$2.0	(80%)
Professional Services	\$158	\$129	(23%)
Total	\$573	\$486	(18%)

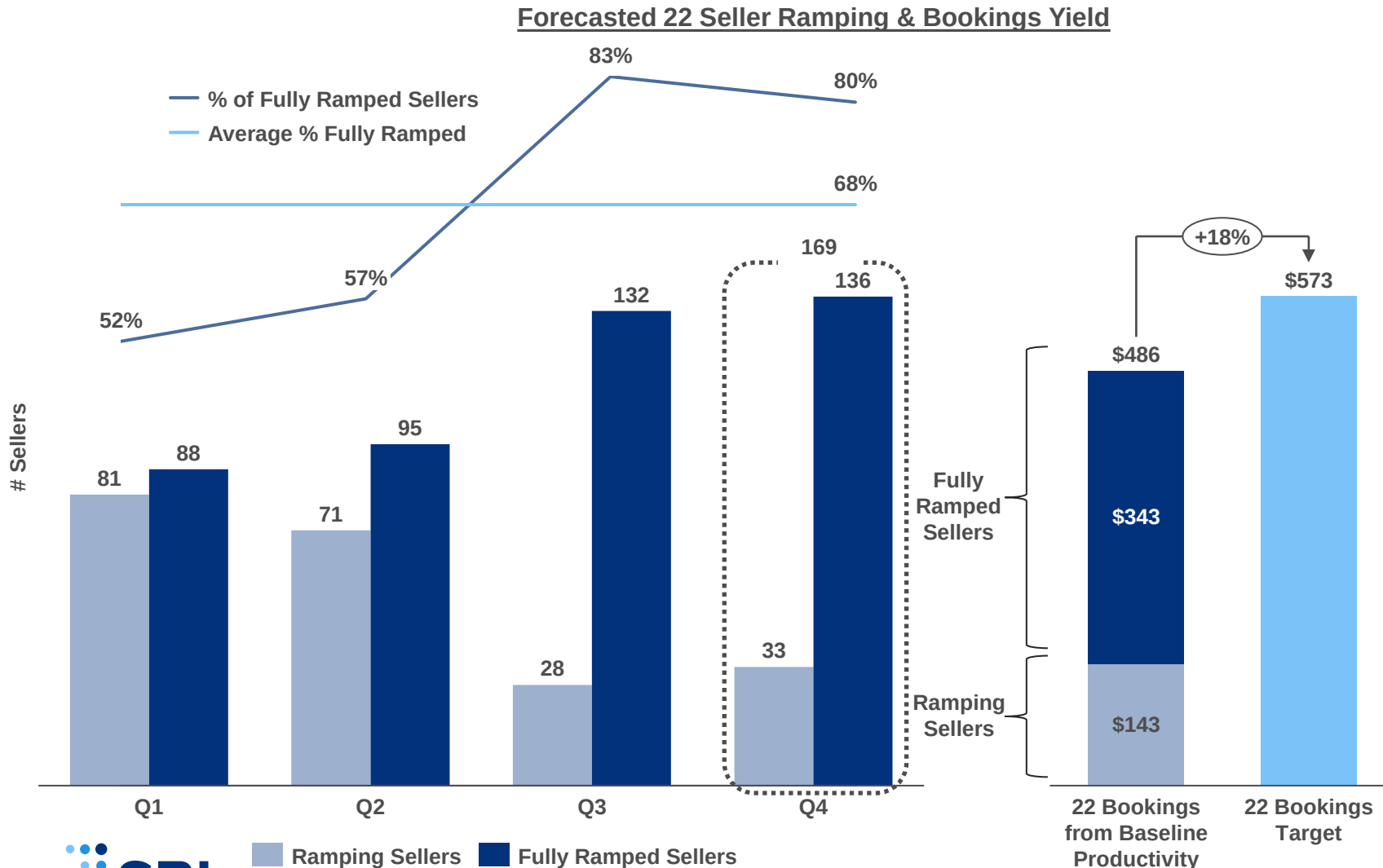
Insights

1. ABG and CX forecasted to exceed target: 2 practice areas primarily due to pre-approved FTE budgets
2. Ramp speed and attrition are main drivers of decreased seller productivity yield
3. Mitigate bookings loss through retention, onboarding and account segmentation: In addition to employee retention and onboarding programs, sellers focused on highest potential opportunities (account segmentation) will help mitigate bookings lost



1. Remaining teams include International Sales, M&A, Channel Sales, NA SAP, and Adaptive Insights.

Ramping sellers forecasted to yield \$143M in FY22, rehiring within 1 quarter after attrition is vital to mitigate bookings exposure



Insights

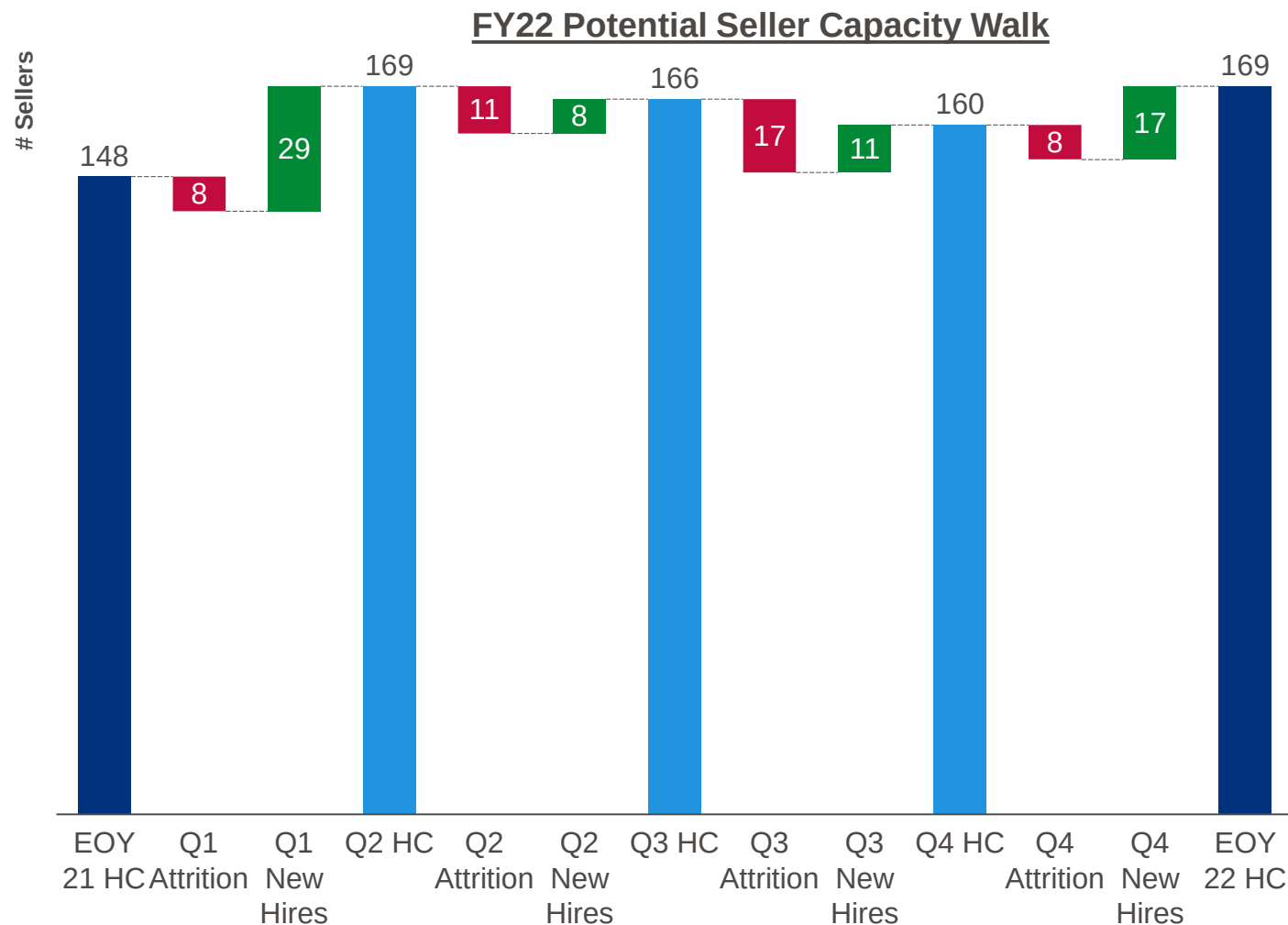
- FY 22 plan of frontloading hiring in Q1:** Early year hiring will give Alight the ability to see productivity from new sellers in H2.
- Mitigate attrition of key solution areas:** Due to speed to ramp and average productivity, loss of highly productive teams will impact bookings.
- There are two ways to make up 18% bookings**
 - Leverage account segmentation** output to build better territory alignment to opportunity. This will improve productivity by ~8-10%.
 - Increase enablement and onboarding** to best practice to improve new seller ramping speed. This will improve productivity in ~3-6% productivity improvement. (See appendix slide for seller enablement growth model)



1. Professional Service planned FY22 headcount of 29 is included in this model.

Source: Alight Sales Finance Team, SBI Capacity Model

It is critical to front load hiring in Q1 knowing attrition will occur throughout the year



Insights

1. In addition to planned Q1 hires, additional hiring in Q2 is recommended to prepare for attrition on teams: Hiring frontloading in Q1/Q2 to allow sellers to ramp. Attrited sellers should be replaced in the next quarter
2. Productivity uplift of .
3. **Productivity realization of hires in H2 will be minimal**, hiring in H2 will enable sellers in FY23.
4. **Attrition:** Applied historical attrition per team year yielding ~44 churned sellers for 2022
5. **Ramp Time:** FY22 new hire ramp schedules assumed a schedule for a seller to achieve 100% productivity based on their team
 - a. Market Makers take 4 quarters to fully ramp
 - b. Strategic Accounts Executives take 3 quarters to fully ramp
 - c. All other teams are fully ramped after 2 quarters

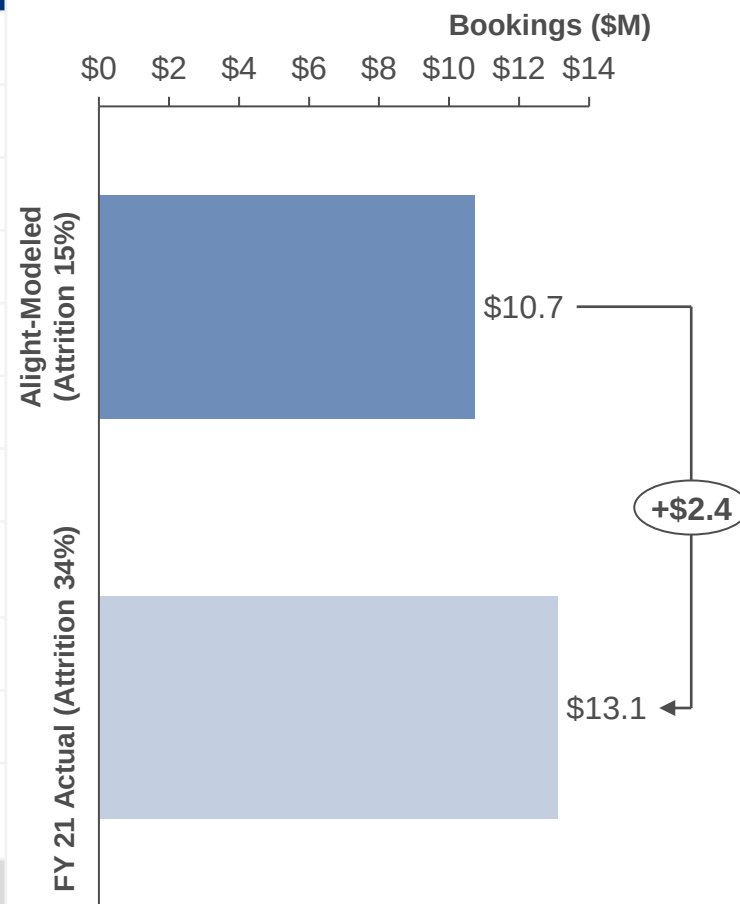


1. Hiring after Q1 has been populated by SBI based off forecasted attrition and goal to end 22 with 177 sellers.

Modeling attrition based on FY21 actual attrition rates shows 44 churned sellers and \$13.1M bookings exposure compared to planned attrition

Practices	Alight-Modeled	FY21 Actual	# Attrited
MM Health	15%	44%	9
DVS		30%	2
Con Exp.		30%	3
Navigation		30%	1
Market Makers		30%	1
Wealth		17%	1
ABG		44%	2
Strategic Accounts		16%	7
Payroll		44%	4
LM Health		44%	4
Professional Services		49%	10
Overall Avg.		34%	44

FY22 Forecasted At-Risk Bookings per Practice (Alight Modeled vs SBI Modeled Attrition)



Insights

1. 8 of 11 Practices had turnover rates over 15%, ranging from 17-60% in FY 21
2. \$10.7M of bookings at risk using 15% attrition, \$14.7M bookings at risk using actuals per team
3. Improving attrition rates is key to increasing productivity
4. Decreasing attrition in H2 will increase bookings yield since new hires in H2 will be on a ramp schedule with limited contributions to bookings



1. For smaller teams of less than 6 where attrited sellers is 1-2 annually. Attrition is assumed to happen in second half of the year.

Source: SBI Capacity Model, Alight + NGA Headcount file

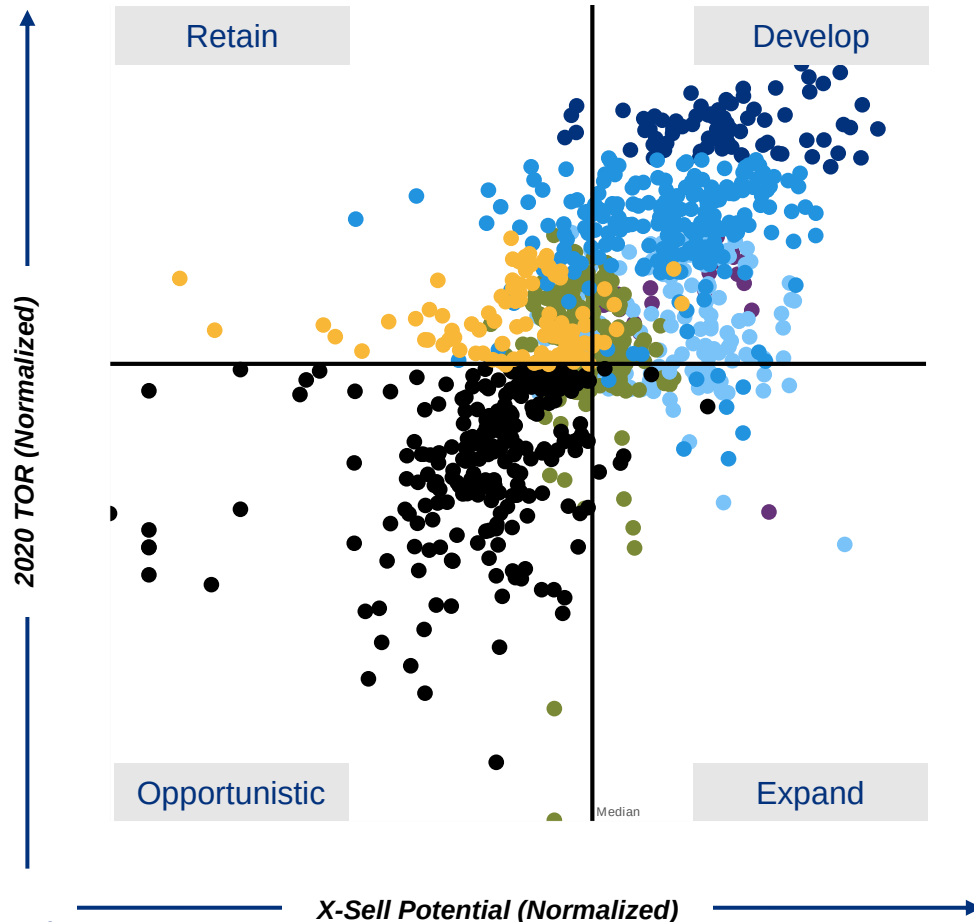


Segmentation & Coverage

Applying PtB to existing segmentation work provides an additional lens to assess optimal coverage

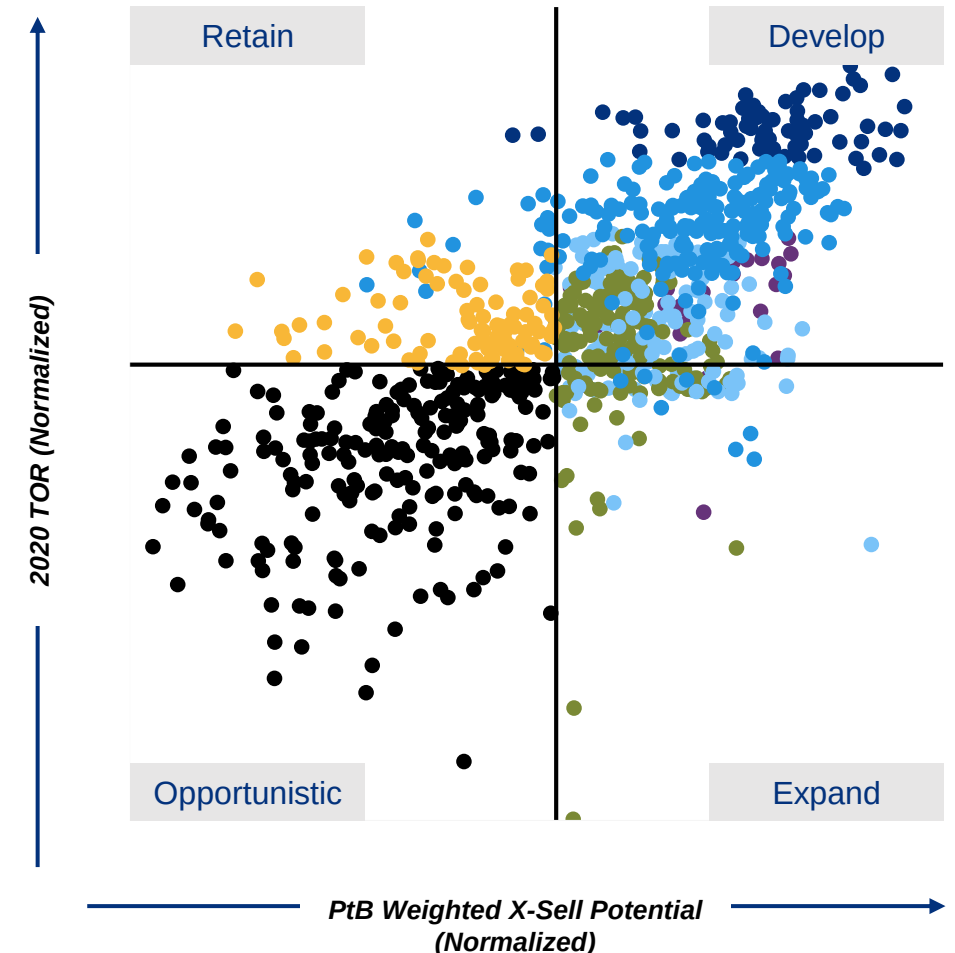
Total Operating Revenue vs X-Sell Potential

Accounts colored by recommended account classification

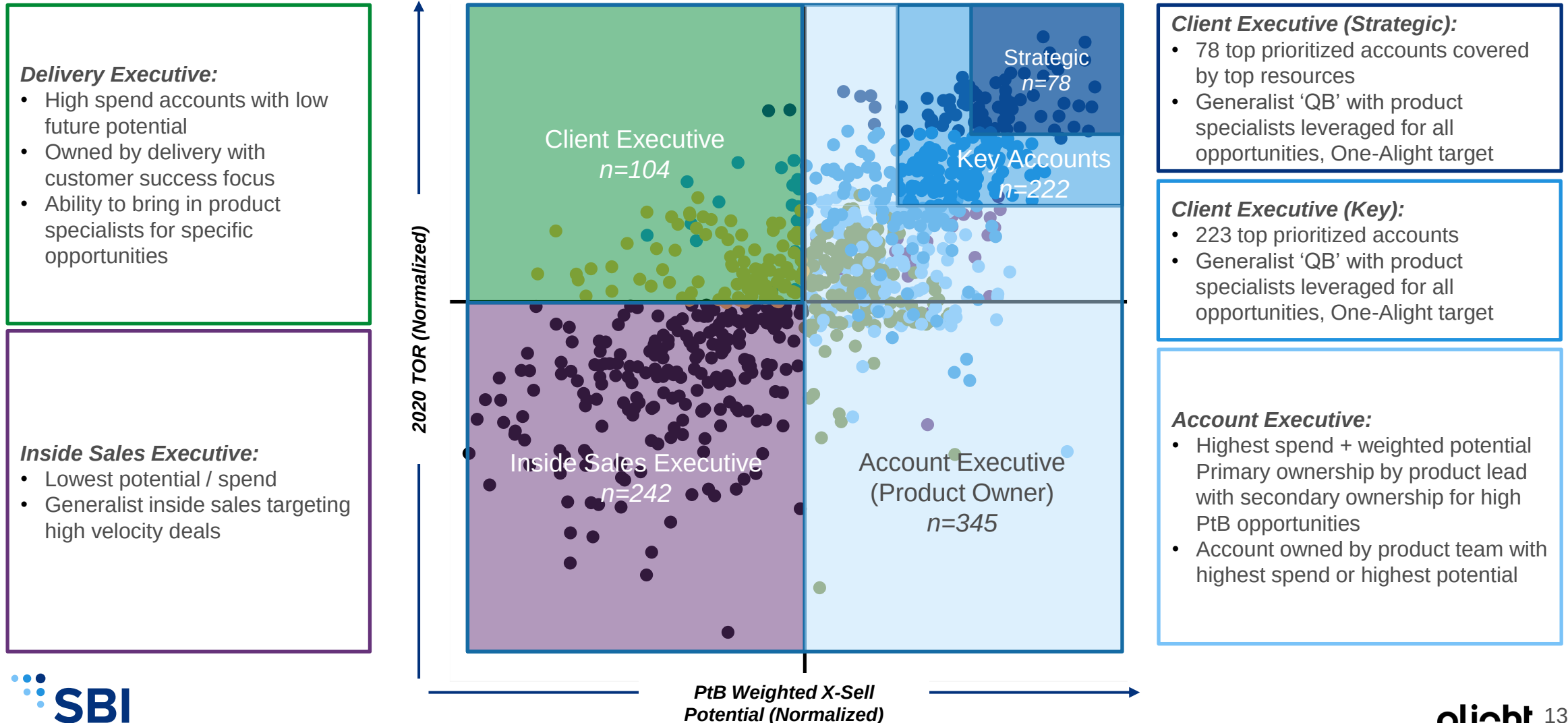


Total Operating Revenue vs PtB weighted X-Sell Potential

Accounts colored by recommended account classification



Alight should use segmentation data and guiding principles to inform resource and account allocation



As Alight continues to build out a centralized sales team, it is important to separate the 3 selling motions and resource accordingly



Recommended coverage will simplify the current account ownership model and enable a more efficient selling motion to the base

Future State Proposed Coverage Design

Strategic:

1. Weighted potential plus spend is > 3.5x average from top 1000 accounts

Key:

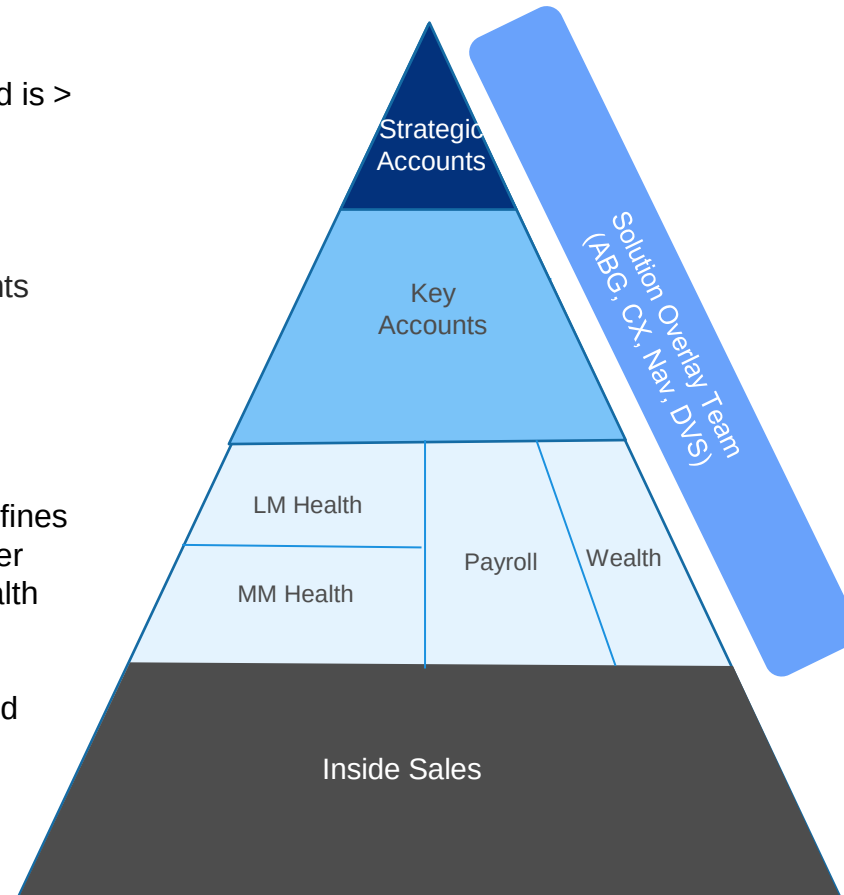
1. Strategic org overall represents ~80% of revenue and 63% potential

Product:

1. Highest spend or potential defines primary product account owner
2. Tiered by LM and MM for health

Inside Sales:

1. Accounts with <50th pctl spend and PtB weighted potential



Recommended Changes

Current State:

1. Navigation, ABG, DVS, and CX products can be sold by the LM Health, MM Health and Strategic teams.
2. Individual selling teams for these products complicates the overlay process and account ownership.
3. Segmentation and potential showed that **these products rarely have the highest potential and spend** thus there would be no accounts owned by these teams.

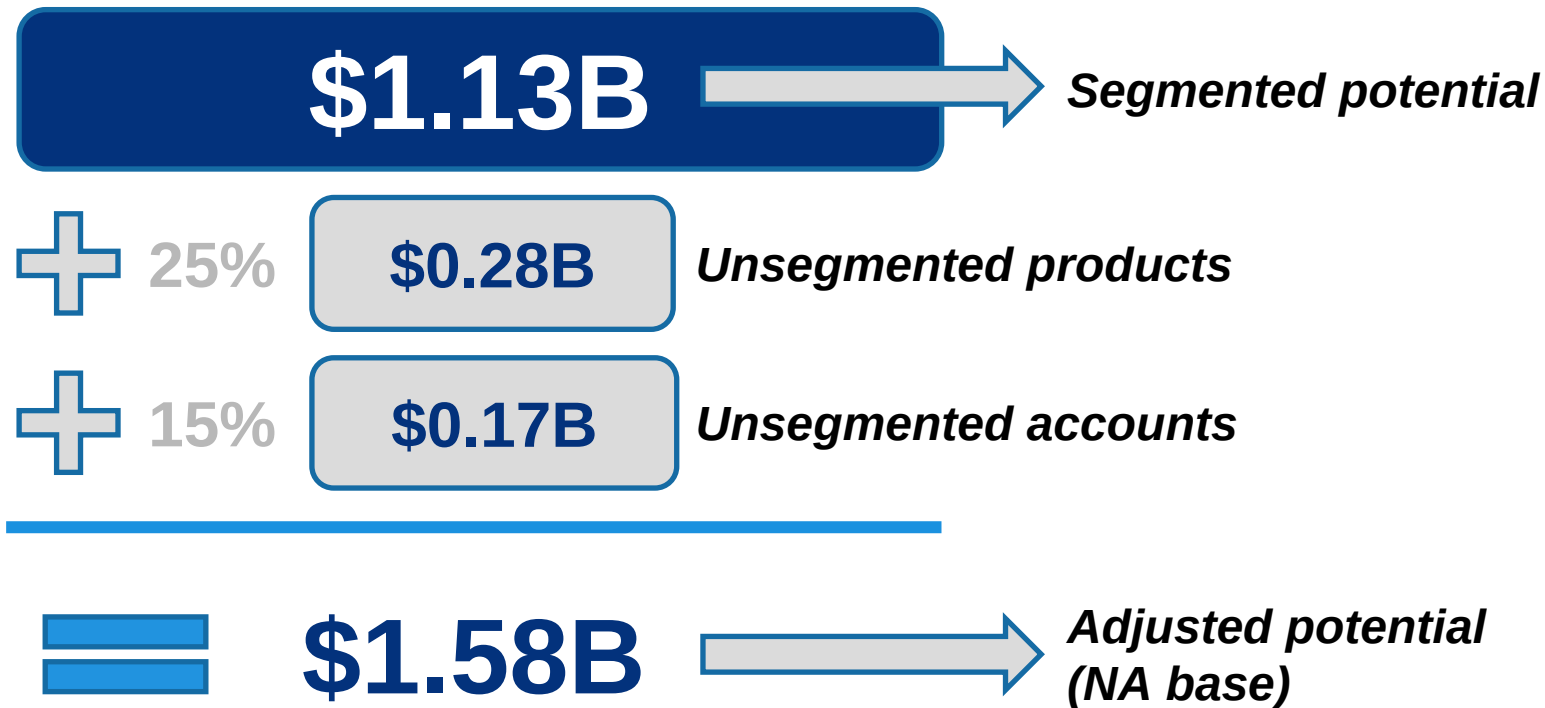
Recommendation:

1. Future org design should aim to integrate solution sellers into the broader health teams and move away from current overlay model
2. Any future product acquisitions should follow a roadmap to integrate the sellers into an existing team in the organization (i.e., Health, Wealth, or Payroll)
3. **SBI recommends retaining 1 – 2 overlay sellers for these teams to only support strategic accounts and moving the remaining sellers to LM or MM health team to enable the sale of the entire health product suite.**



Capacity & Territory

Based on segmentation work, SBI estimates \$1.58B in potential to cross-sell the account base



Insights

1. Segmentation of top products for top 1000 accounts yielded \$1.13B in potential
2. Unsegmented products make up ~25% of current spend with Alight
3. Unsegmented accounts make up ~15% of spend with Alight
4. Resulting total potential for all products and accounts is estimated at \$1.58B

SBI recommends leveraging segmentation and PtB work to drive prioritization in order to achieve \$414M bookings in Growth Case

Scenario	Potential (\$B)	Potential: Bookings	Forecasted FY22 Bookings (\$M)				Bookings Target (\$M)	Bookings Gap/Surplus (\$M)	Planned HC		Expected Productivity	
			Field Sales Team		New Logo Team	Total			Field	New Logo	Field Sales	New logo
			Net New	New Logo								

Base Case	\$1.582	10:1	\$158	\$80	\$60	\$298	\$416	(\$175)	113	35	\$2.1	\$1.7
Growth Case	\$1.582	6:1	\$264	\$80	\$70	\$414	\$416	(\$2)	113	35	\$3.0	\$2.0
Aggressive Case	\$1.582	5:1	\$316	\$80	\$80	\$476	\$416	\$60	113	35	\$3.5	\$2.3

Insights

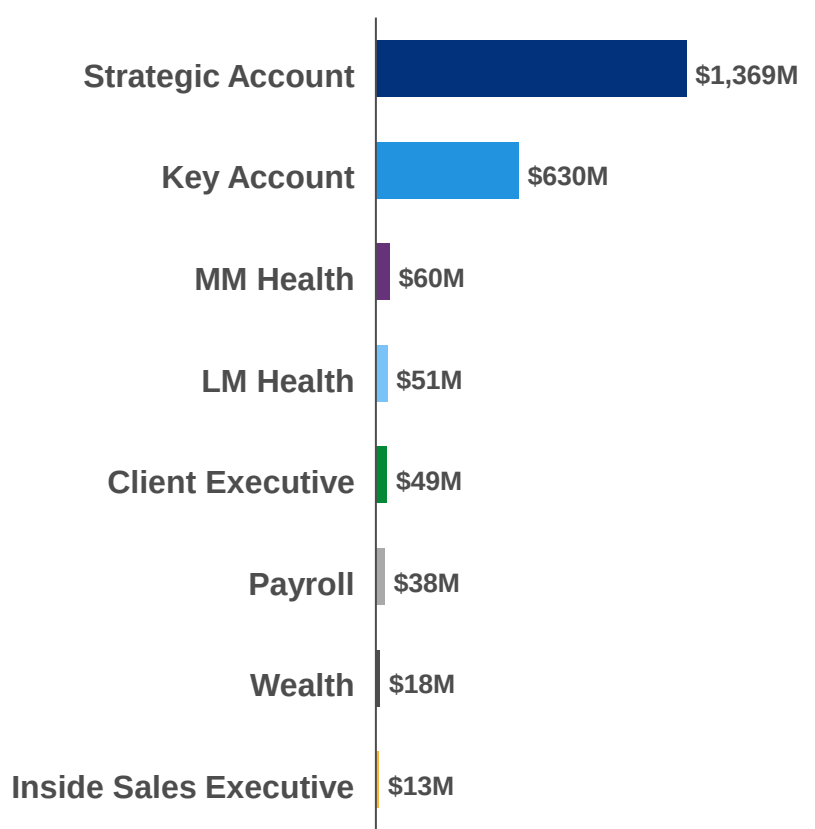
1. Delivering accurate account information to sellers will enable account prioritization in territories to get to best in class conversion rates of potential
2. Extrapolating out PtB to the prospect universe will improve new logo win rates and subsequently bookings
3. Data drive territory design process will improve equity in sellers that are currently underperforming



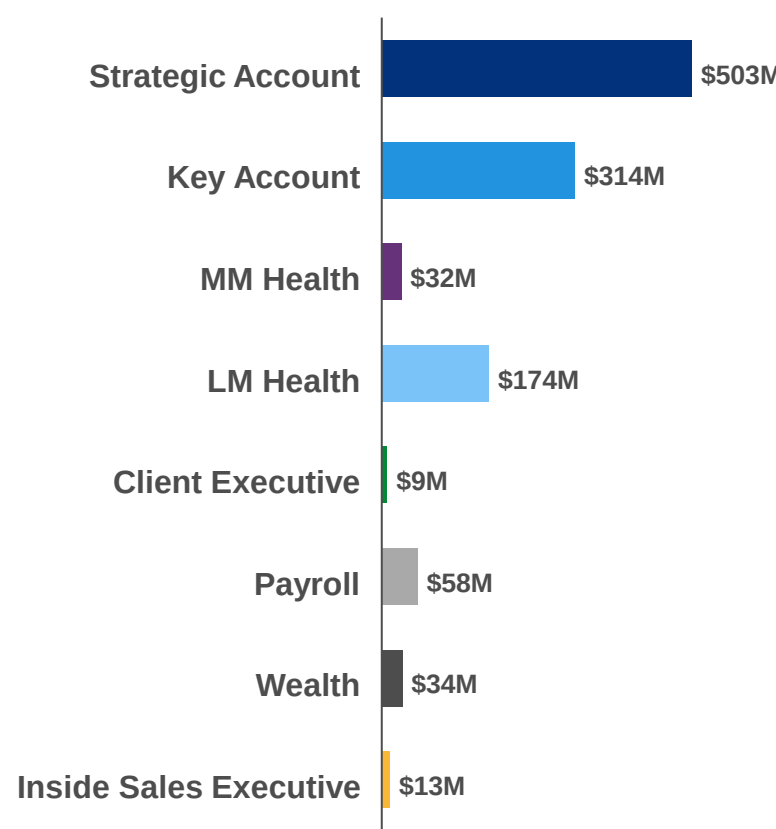
1. Professional Services planned FY22 headcount of 29 is not included in this model.
2. Bookings target of \$416M does not include forecasted bookings from Professional Services.
3. Growth Case productivity targets (\$3.0M Field Sales, \$2.0M New Logo), are in line with benchmark.

991 accounts have been prioritized across 6 core selling teams using guiding principles informed by segmentation and PtB

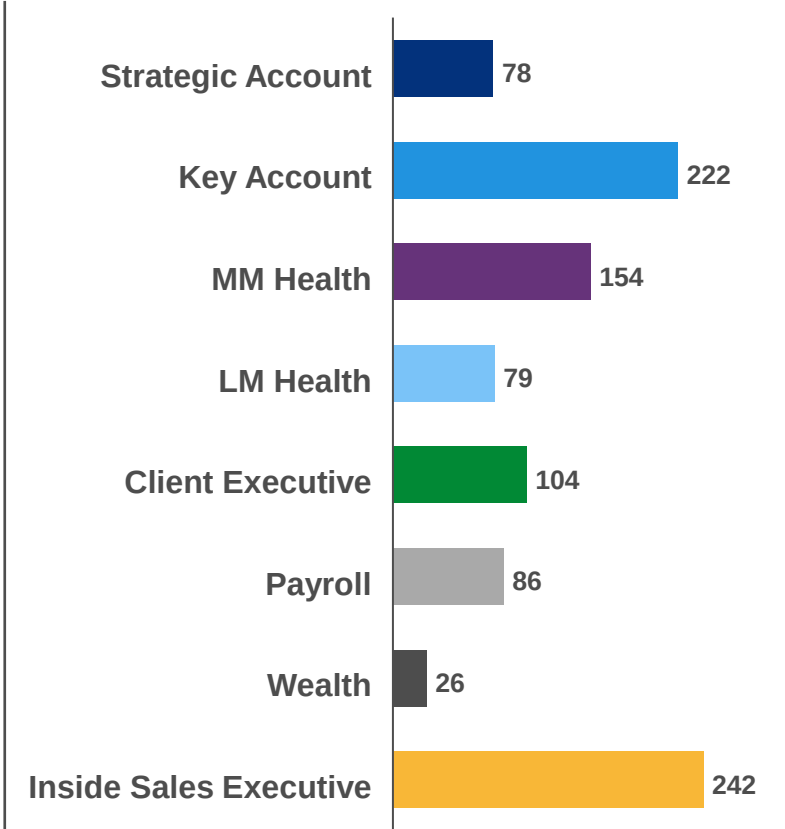
2020 TOR by Recommended Team



Potential by Recommended Team



of Primary Accounts by Recommended Team



Strategic Accounts Summary

Account Assignment Criteria

What qualifies as a Strategic Account?

Guidelines:

Assign the accounts with the highest spend and potential to the best sellers

Criteria:

Accounts with >3.5x the Average Spend + PtB Weighted Potential when compared to the segmented accounts

Account Assignment Detail

What are the Key Metrics of the recommended Strategic Accounts?

78

Accounts

\$1.4B

2020 Spend

\$503M

Total Potential*

~13

Projected Sellers*

\$108M

Spend / Seller

~\$39M

Potential / Seller

5-7

Accounts / Seller

Strategic Accounts – Primary Account Statistics

Strategic Account - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace / X-Sell Potential - P..	Avg PtB Percentile - Opportunities
ABG	0	18	\$0.0M	\$0.0M	
AMS	28	43	\$44.3M	\$0.0M	
Cloud Services	35	43	\$195.9M	\$47.0M	78th
Comm DSI	68	9	\$49.3M	\$0.0M	
Compliance	71	6	\$17.8M	\$0.0M	
DB	43	35	\$151.7M	\$0.0M	
DC	49	28	\$214.9M	\$142.9M	80th
Eligibility Mgmt	66	11	\$9.9M	\$9.3M	62th
Health Nav	36	38	\$38.3M	\$102.3M	65th
Health Topside & ..	0	78	\$0.0M	\$0.0M	
Hosted	10	62	\$66.7M	\$0.0M	
Hype	2	50	\$0.6M	\$35.1M	78th
LM Health	73	5	\$479.0M	\$108.1M	75th
MM Health	7	0	\$3.4M	\$0.0M	
Other Topside	4	69	\$0.0M	\$0.0M	
Partner Network	12	66	\$10.3M	\$0.0M	
SmartChoice	53	25	\$36.6M	\$31.2M	68th
Upoint	53	25	\$11.6M	\$0.0M	
Grand Total	78	78	\$1,330.3M	\$475.9M	74th

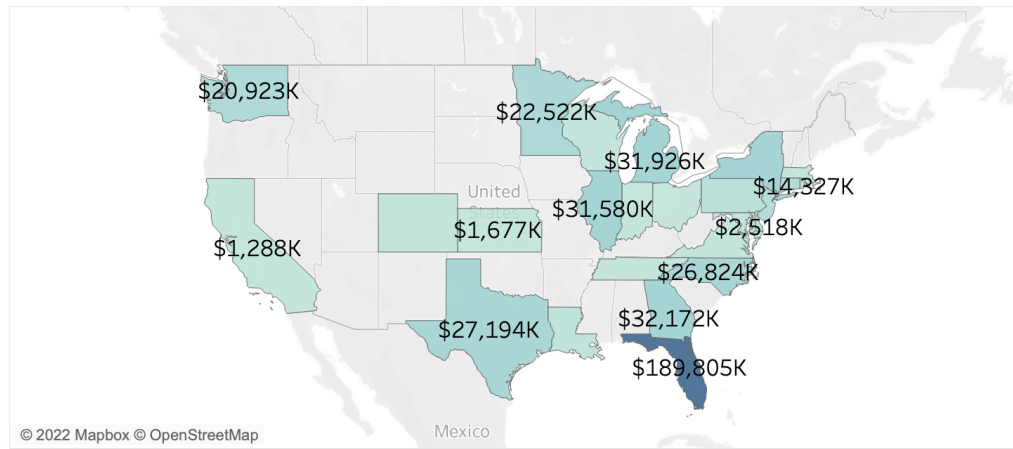
Strategic Account Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace / X-Sell Potential	PtB Weighted Whitespace
NA Sales	3	\$51,839K	\$14,628K	\$2,208K
Strategic Accounts	71	\$1,271,692K	\$455,332K	\$72,358K
Unknown	4	\$45,749K	\$33,310K	\$4,699K
Grand Total	78	\$1,369,279K	\$503,270K	\$79,264K

Account Classifi..
Strategic Accou..

Potential x 1000
\$113K 190M

Strategic Account - Whitespace by State



1. Total Potential, not PtB Weighted Shown
2. Sellers for Strategic not broken out, assumed based on # of accounts
3. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

Key Accounts Summary

Account Assignment Criteria

What qualifies as a Key Account?

Guidelines:

Assign the accounts with the highest spend and potential to the best sellers

Criteria:

Accounts with >1x the Average Spend + PtB Weighted Potential when compared to the segmented accounts or existing Alight Key Accounts

Account Assignment Detail

What are the Key Metrics of the recommended Key Accounts?

222

Accounts

\$630M

2020 Spend

\$314M

Total Potential*

~38

Projected Sellers*

~\$16M

Spend / Seller

~\$8M

Potential / Seller

4-6

Accounts / Seller



1. Total Potential, not PtB Weighted Shown
2. Sellers for Strategic not broken out, assumed based on # of accounts
3. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

Key Accounts – Primary Account Statistics

Key Account - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace / X-Sell Potential - P..	Avg PtB Percentile - Opportunities
ABG	1	80	\$0.2M	\$0.0M	
AMS	45	95	\$30.5M	\$0.0M	
Cloud Services	47	129	\$60.6M	\$21.9M	60th
Comm DSI	118	81	\$18.5M	\$0.0M	
Compliance	149	48	\$8.2M	\$0.0M	
DB	66	131	\$72.0M	\$0.0M	
DC	71	129	\$75.6M	\$105.3M	71th
Eligibility Mgmt	127	61	\$5.6M	\$4.8M	53th
Health Nav	75	90	\$12.0M	\$33.6M	55th
Health Topside & ..	0	222	\$0.0M	\$0.0M	
Hosted	3	132	\$5.7M	\$0.0M	
Hype	2	38	\$0.2M	\$7.1M	53th
LM Health	100	100	\$199.2M	\$58.6M	66th
MM Health	73	4	\$79.0M	\$0.4M	30th
Other Topside	13	155	-\$0.6M	\$0.0M	
Partner Network	14	171	\$0.8M	\$0.0M	
SmartChoice	102	87	\$21.0M	\$13.3M	56th
Upoint	65	133	\$6.3M	\$0.0M	
Grand Total	213	222	\$594.9M	\$244.9M	57th

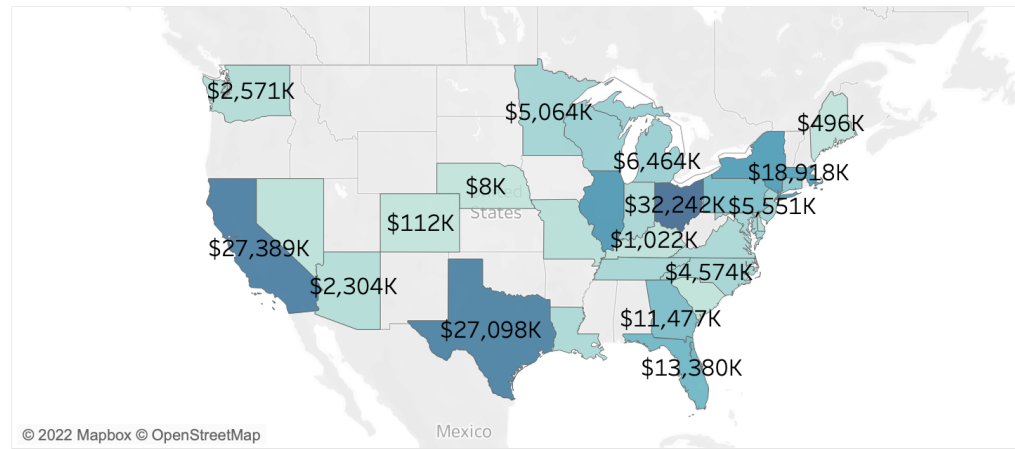
Key Account Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace / X-Sell Potential	PtB Weighted Whitespace
NA Sales	4	\$12,843K	\$7,889K	\$734K
Strategic Accounts	164	\$464,625K	\$237,798K	\$27,465K
Unknown	55	\$152,241K	\$68,107K	\$5,974K
Grand Total	222	\$629,709K	\$313,793K	\$34,174K

Account Classifi..
Key Account

Potential x 1000
\$8K 32M

Key Account - Whitespace by State



1. Total Potential, not PtB Weighted Shown
2. Sellers for Strategic not broken out, assumed based on # of accounts
3. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

LM Health Summary

Account Assignment Criteria

What qualifies as a LM Health Account?

Guidelines:

Prioritize accounts with high Spend or PtB Weighted Potential in specific products with dedicated product sellers

Criteria:

Accounts where highest spend or weighted potential is >50th Percentile and LM Health products are the highest ranked

Account Assignment Detail

What are the Key Metrics of the recommended LM Health Accounts?

79

Primary Accounts

\$51M

2020 Spend

\$189M

Total Potential*

11

Projected Sellers

\$4.6M

Primary Spend / Seller

\$17M

Total Potential / Seller

6-8

Primary Accounts / Seller

LM Health – Primary Account Statistics

LM Health - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace / X-Sell Potential - P..	Avg PtB Percentile - Opportuniti..
ABG	10	48	\$6.3M	\$0.0M	
Comm DSI	14	36	\$1.5M	\$0.0M	
Compliance	17	20	\$0.6M	\$0.0M	
Eligibility Mgmt	26	26	\$1.4M	\$2.7M	48th
Health Nav	15	24	\$4.2M	\$11.2M	41th
Health Topside & Choice	0	79	\$0.0M	\$0.0M	
Hype	0	8	\$0.0M	\$1.6M	49th
LM Health	13	42	\$10.5M	\$38.6M	63th
Partner Network	1	30	\$0.0M	\$0.0M	
SmartChoice	17	27	\$2.6M	\$5.3M	48th
Upoint	5	43	\$0.4M	\$0.0M	
Grand Total	59	79	\$27.5M	\$59.4M	48th

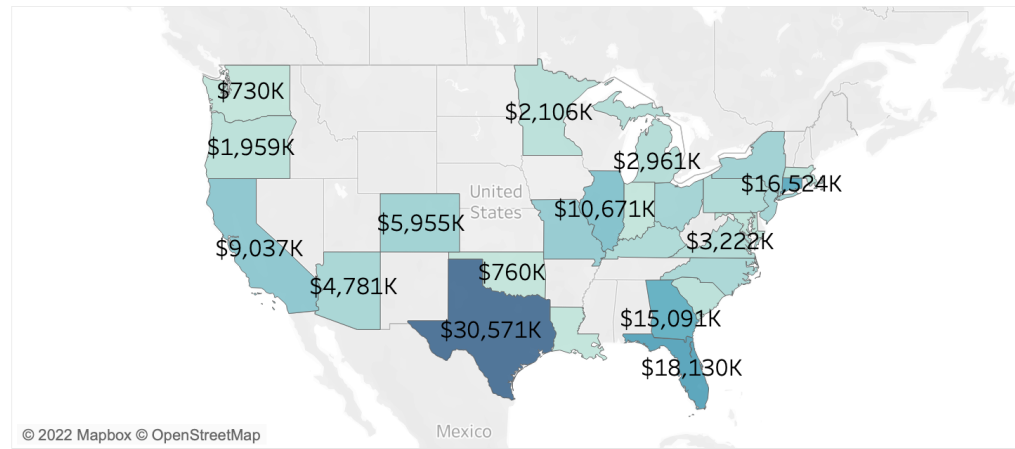
LM Health Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace / X-Sell Potential	PtB Weighted Whitespace
NA Sales	2	\$1,743K	\$5,993K	\$208K
Strategic Accounts	13	\$7,941K	\$55,935K	\$5,224K
Unknown	64	\$40,964K	\$112,085K	\$5,540K
Grand Total	79	\$50,648K	\$174,012K	\$10,973K

Account Classifi..
LM Health

Potential x 1000
\$728K 31M

LM Health - Whitespace by State



1. Total Potential, not PtB Weighted Shown
2. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

MM Health Summary

Account Assignment Criteria

What qualifies as a MM Health Account?

Guidelines:

Prioritize accounts with high Spend or PtB Weighted Potential in specific products with dedicated product sellers

Criteria:

Accounts where highest spend or weighted potential is >50th Percentile and MM Health products are the highest ranked

Account Assignment Detail

What are the Key Metrics of the recommended MM Health Accounts?

154

Primary Accounts

\$60M

2020 Spend

\$38M

Total Potential*

27

Projected Sellers

\$1.4M

Primary Spend / Seller

\$2.2M

Total Potential / Seller

4-6

Primary Accounts / Seller

MM Health – Primary Account Statistics

MM Health - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace / X-Sell Potential - P..	Avg PtB Percentile - Opportuniti..
ABG	3	71	\$0.9M	\$0.0M	
Comm DSI	40	47	\$4.0M	\$0.0M	
Compliance	54	39	\$0.7M	\$0.0M	
Eligibility Mgmt	54	31	\$1.2M	\$0.6M	40th
Health Nav	50	72	\$8.1M	\$5.0M	56th
Health Topside & Choice	0	154	\$0.0M	\$0.0M	
Hype	0	4	\$0.0M	\$0.1M	46th
MM Health	80	5	\$32.0M	\$0.9M	38th
Partner Network	1	52	\$0.0M	\$0.0M	
SmartChoice	44	50	\$2.9M	\$1.8M	46th
Upoint	13	69	\$1.3M	\$0.0M	
Grand Total	150	154	\$51.2M	\$8.5M	46th

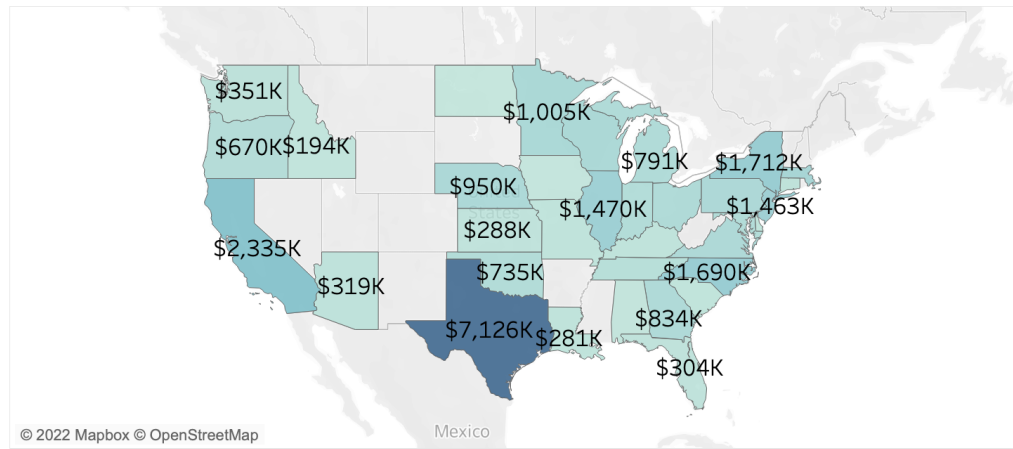
MM Health Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace / X-Sell Potential	PtB Weighted Whitespace
NA Sales	2	\$640K	\$670K	\$92K
Solution Sales	1	\$111K	\$310K	\$81K
Strategic Accounts	10	\$3,607K	\$1,234K	\$185K
Unknown	141	\$55,785K	\$29,449K	\$3,287K
Grand Total	154	\$60,142K	\$31,663K	\$3,645K

Account Classifi..
MM Health

Potential x 1000
\$80K \$7,126K

MM Health - Whitespace by State



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1. Total Potential, not PtB Weighted Shown
2. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

Wealth Summary

Account Assignment Criteria

What qualifies as a Wealth Account?

Guidelines:

Prioritize accounts with high Spend or PtB Weighted Potential in specific products with dedicated product sellers

Criteria:

Accounts where highest spend or weighted potential is >50th Percentile and Wealth products are the highest ranked

Account Assignment Detail

What are the Key Metrics of the recommended Wealth Accounts?

26

Primary Accounts

\$18M

2020 Spend

\$103M

Total Potential*

6

Projected Sellers

\$3M

Primary Spend / Seller

\$17M

Total Potential / Seller

3-5

Accounts / Seller

Wealth – Primary Account Statistics

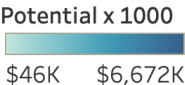
Wealth - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace/ X-Sell Potential - P..	Avg PtB Percentile - Opportuniti..
DB	19	7	\$11.3M	\$0.0M	
DC	13	10	\$4.5M	\$7.6M	78th
Grand Total	24	16	\$15.9M	\$7.6M	78th

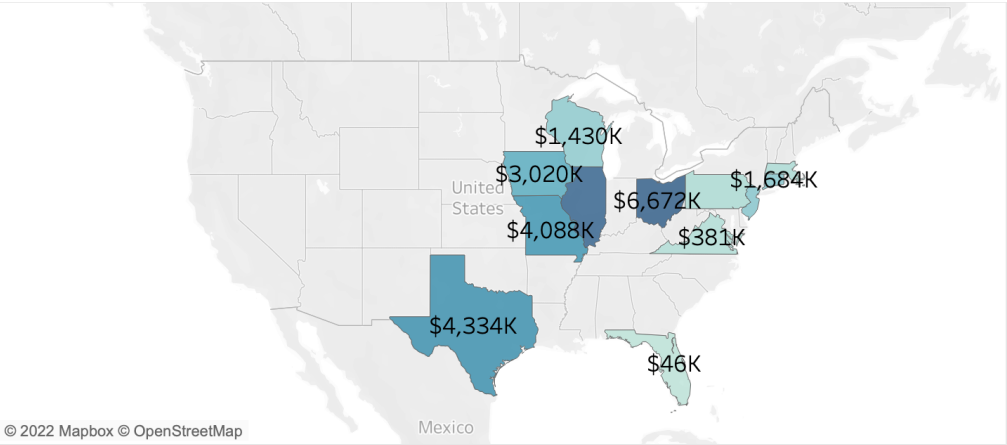
Wealth Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace/ X-Sell Potential	PtB Weighted Whitespace
NA Sales	1	\$539K	\$523K	\$36K
Strategic Accounts	6	\$4,174K	\$5,405K	\$425K
Unknown	19	\$12,848K	\$27,751K	\$3,289K
Grand Total	26	\$17,560K	\$33,678K	\$3,750K

Account Classifi..
Wealth



Wealth - Whitespace by State



1. Total Potential, not PtB Weighted Shown
2. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

Payroll Summary

Account Assignment Criteria

What qualifies as a Payroll Account?

Guidelines:

Prioritize accounts with high Spend or PtB Weighted Potential in specific products with dedicated product sellers

Criteria:

Accounts where highest spend or weighted potential is >50th Percentile and Payroll products are the highest ranked

Account Assignment Detail

What are the Key Metrics of the recommended Payroll Accounts?

86

Primary Accounts

\$38M

2020 Spend

\$72M

Total Potential*

11

Projected Sellers

\$3.5M

Primary Spend / Seller

\$6.5M

Total Potential / Seller

6-9

Primary Accounts / Seller

Payroll– Primary Account Statistics

Payroll - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace / X-Sell Potential - P..	Avg PtB Percentile - Opportuniti..
AMS	72	14	\$17.9M	\$0.0M	
CDS	16	65	\$6.5M	\$0.0M	
Cloud Services	32	50	\$11.5M	\$2.7M	70th
Hosted	0	9	\$0.0M	\$0.0M	
Other Topside	5	53	\$0.0M	\$0.0M	
Grand Total	86	85	\$36.0M	\$2.7M	70th

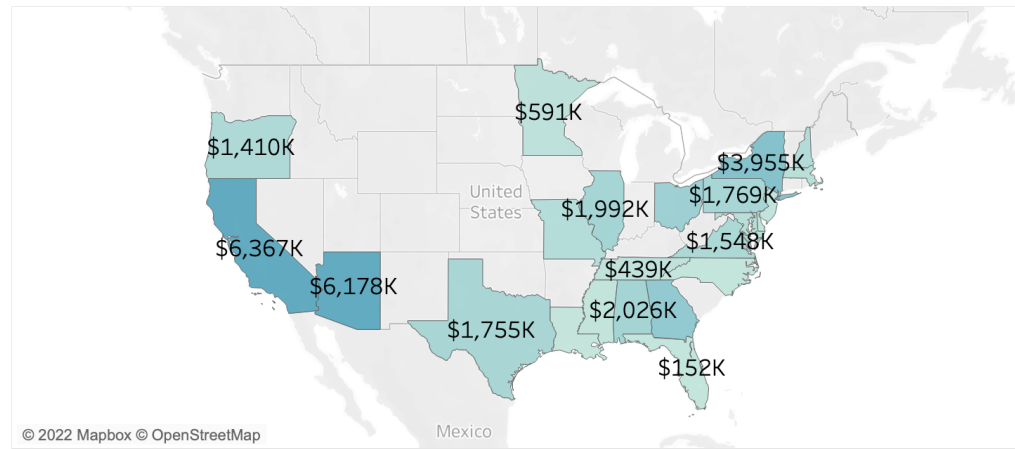
Payroll Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace / X-Sell Potential	PtB Weighted Whitespace
NA Sales	3	\$795K	\$4,382K	\$75K
Strategic Accounts	6	\$2,704K	\$4,354K	\$327K
Unknown	76	\$34,093K	\$49,065K	\$1,526K
Wealth	1	\$224K	\$595K	\$63K
Grand Total	86	\$37,815K	\$58,395K	\$1,991K

Account Classifi..
Payroll

Potential x 1000
\$96K 11M

Payroll - Whitespace by State



1. Total Potential, not PtB Weighted Shown
2. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

Customer Executives Summary

Account Assignment Criteria

What qualifies?

Guidelines:

Cover accounts with high spend and low cross-sell opportunity with a customer success focused motion

Criteria:

Accounts with >50th Percentile in Spend and <50th Percentile in PtB Weighted Potential

Account Assignment Detail

What are the Key Metrics of the recommended Client Executive Team?

104

Accounts

\$49M

2020 Spend

\$9M

Total Potential*

TBD

Sellers

\$40M

Spend / Seller

\$10M

Potential / Seller

2-5

Accounts / Seller

Client Executive Owned – Primary Account Statistics

Client Executive - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace / X-Sell Potential - P..	Avg PtB Percentile - Opportuniti..
ABG	10	43	\$2.8M	\$0.0M	
AMS	23	19	\$4.9M	\$0.0M	
CDS	13	32	\$3.2M	\$0.0M	
Cloud Services	8	22	\$1.8M	\$0.3M	34th
Comm DSI	19	18	\$1.8M	\$0.0M	
Compliance	29	11	\$0.3M	\$0.0M	
DB	4	25	\$0.9M	\$0.0M	
DC	7	31	\$1.6M	\$0.0M	15th
Eligibility Mgmt	30	14	\$0.3M	\$0.1M	36th
Health Nav	36	6	\$3.5M	\$0.1M	24th
Health Topside & ..	0	104	\$0.0M	\$0.0M	
Hosted	0	11	\$0.0M	\$0.0M	
Hype	0	5	\$0.0M	\$0.1M	47th
LM Health	11	23	\$5.1M	\$0.0M	
MM Health	65	0	\$19.8M	\$0.0M	15th
Other Topside	1	44	\$0.0M	\$0.0M	
Partner Network	0	27	\$0.0M	\$0.0M	
SmartChoice	33	10	\$2.3M	\$0.1M	32th
Upoint	6	26	\$0.6M	\$0.0M	
Grand Total	104	104	\$48.9M	\$0.7M	34th

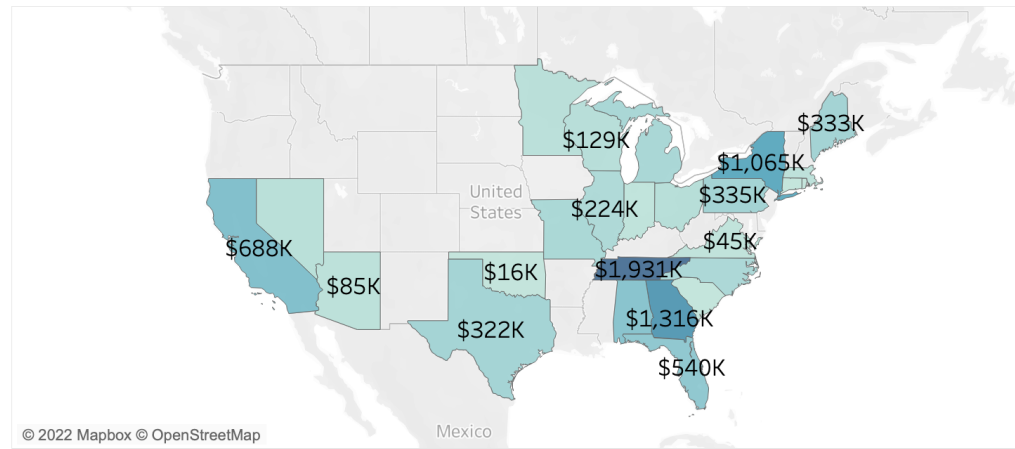
Client Executive Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace / X-Sell Potential	PtB Weighted Whitespace
NA Sales	1	\$831K	\$12K	\$1K
Strategic Accounts	8	\$6,360K	\$440K	\$11K
Unknown	95	\$41,679K	\$8,699K	\$121K
Grand Total	104	\$48,870K	\$9,150K	\$133K

Account Classifi..
Client Executive

Potential x 1000
\$0K \$1,931K

Client Executive - Whitespace by State



1. Total Potential, not PtB Weighted Shown
2. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

Inside Sales Executives Summary

Account Assignment Criteria

What qualifies as an Inside Sales Account?

Guidelines:

Cover accounts with limited spend and weighted potential with centralized resources to win opportunistic expansion in the long tail

Criteria:

Accounts with <50th Percentile in Spend and <50th Percentile in PtB Weighted Potential

Account Assignment Detail

What are the Key Metrics of the recommended Inside Sales Accounts?

242

Accounts

\$13M

2020 Spend

\$13M

Total Potential*

TBD

Current Sellers

TBD

Spend / Seller

TBD

Potential / Seller

TBD

Accounts / Seller

Inside Sales Executive – Primary Account Statistics

Inside Sales Executive - Summary Statistics

Product Name	# of Current Accounts w/ Spend	# of Opportunities > 50th Perc	Current Spend	Whitespace / X-Sell Potential - P..	Avg PtB Percentile - Opportuniti..
ABG	2	82	\$0.1M	\$0.0M	
AMS	16	21	\$1.8M	\$0.0M	
CDS	3	26	\$0.1M	\$0.0M	
Cloud Services	2	17	\$0.2M	\$0.1M	21th
Comm DSI	2	1	\$0.0M	\$0.0M	
Compliance	2	5	\$0.0M	\$0.0M	
DB	0	14	\$0.0M	\$0.0M	
DC	0	10	\$0.0M	\$0.0M	15th
Eligibility Mgmt	2	8	\$0.0M	\$0.0M	19th
Health Nav	9	9	\$0.2M	\$0.1M	19th
Health Topside & ..	0	242	\$0.0M	\$0.0M	
Hosted	0	7	\$0.0M	\$0.0M	
Hype	0	0	\$0.0M	\$0.0M	44th
LM Health	2	13	\$0.3M	\$0.0M	
MM Health	224	0	\$9.8M	\$0.0M	15th
Other Topside	2	19	\$0.0M	\$0.0M	
Partner Network	0	9	\$0.0M	\$0.0M	
SmartChoice	6	7	\$0.0M	\$0.1M	19th
Upoint	0	5	\$0.0M	\$0.0M	
Grand Total	242	242	\$12.6M	\$0.3M	25th

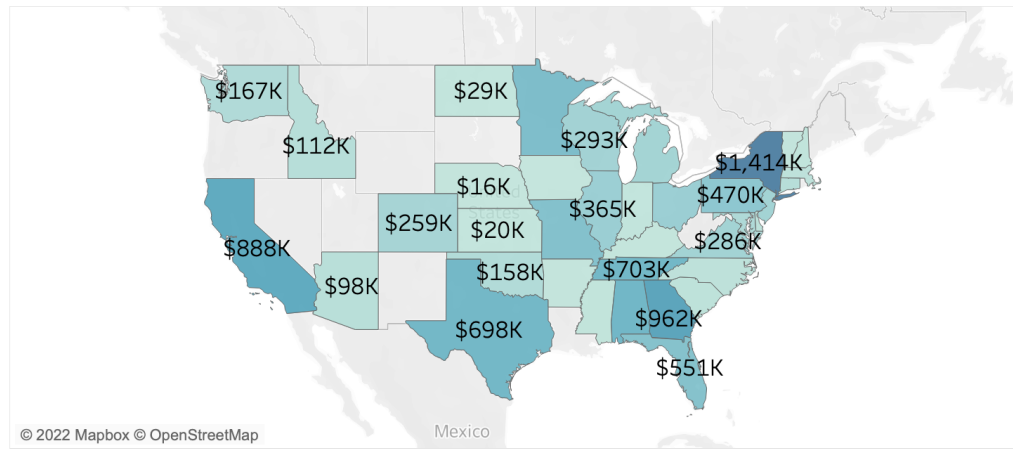
Inside Sales Executive Primary - Current Ownership

Owner Selling Team	# of Accounts	Current Spend	Whitespace / X-Sell Potential	PtB Weighted Whitespace
Strategic Accounts	1	\$105K	\$0K	\$0K
Unknown	241	\$12,458K	\$13,406K	\$148K
Grand Total	242	\$12,563K	\$13,406K	\$148K

Account Classifi..
Inside Sales Exe..

Potential x 1000
\$0K \$1,620K

Inside Sales Executive - Whitespace by State



1. Total Potential, not PtB Weighted Shown
2. Numbers shown only for accounts where team is primary owner, additional potential within customer base as secondary

Execution of FY22 bookings plan depends on 9 prioritized activities

Category	Activity Detail
Account Segmentation	1. Embed SBI Account Segmentation PtB output into Alight Business Intelligence tool and leverage in Territory work
Account Coverage	2. Assign Key and Strategic accounts to Client Executives maintaining a best practice maximum of 30% breakage 3. Create clear rules of engagement for customer success, inside sales executives, and sales development representatives; assign accounts per SBI ROAD model
Territory Planning	4. Distribute accounts equitably amongst seller territories leveraging PtB data 5. Assign primary and secondary owner(s) for each account into SFDC
Other Areas Observed	6. Sales Enablement - Accelerate the expansion of a best-in-class seller onboarding and enablement program - Create practice area playbooks and enablement emphasizing one Alight product fits 7. In order to mitigate 18% FY22 bookings exposure, there need to be significant focus on managing attrition, ramp speeds, and planned hire time. 8. Build an M&A playbook that integrates GTM teams as quickly as possible into the core organization to drive capital efficiencies and overall cross-sell improvement 9. Comp and Quota - Ensure there is alignment with Primary & Secondary Account structure so there is a teaming incentive across product teams

Risk & Mitigation Plan: 3 Risks should be proactively mitigated to ensure FY22 bookings achievement

Type	Description	Mitigation Plan
Execution	Key initiatives are not deployed in FY22 Q1, putting bookings & revenue plan at risk	Assign accountability to Alight resources for deployment and centrally manage initiative progress to milestones
	Front-line managers and ICs resistant to organization, role, and compensation changes	Roll-out top-down change management plan that includes “roadshows”, enablement for manager communication, and “WIIFM” messaging
Operational	Increased turnover in Q1 leads to increased capacity needs and lower morale	Identify key A-Player employees and create bespoke retention plans and include these employees in execution phase
People	Hiring ramp in Q1 & Q2 22 does not reach recommended target, putting FY22 plan at risk	Create weekly update from HR on hiring status to plan; Try new sales seller& front-line manager recruiting firms (3 rd party) when current firms underperform; Implement referral program
	Alight resources may lack skillset or capacity to execute initiatives	Identify key employees that may reside outside of sales org to lead initiatives
Financial	Financial impact not realized on expected timeline	Centrally manage initiatives to value realization, with executive sponsors accountable for progress; scenario plan outcomes based on range of possibilities

Sales Enablement Maturity Model

EXAMPLE

Moving up maturity model improves quota carrying, SDR, and CSM performance over time

Sales Enablement	Level 1 – Ad Hoc	Level 2 – Undefined	Level 3 – Organized	Level 4 – Mature	Level 5 – Repeatable
Org Structure	Few, if any, resources dedicated to sales enablement; responsibilities focus on generic sales training	Underinvestment in sales enablement; team forced to prioritize 1 program at a time and be reactive to requests; AE focused	Dedicated functions within enablement to proactively support multiple programs (onboarding, continuous, new product, etc.)	Dedicated program and training functions that cover all GTM functions (AE, Inside, Renewal, CSM, SE, Channel, etc.)	Every GTM function has a dedicated enablement function ; standard content and training cadence established; enablement org focused on 'what's next'
Leadership & Coaching	Sales enablement is not a known concept within the organization; there is no culture of coaching mentorship, or seller development	Sr. Leadership understands the importance of enablement function; disparate coaching, mentorship, seller dev as needed	Enablement is viewed as a value-add throughout the organization; there is a defined, standard coaching, seller dev cadence with varied adoption	Revenue enablement is a key driver of achieving growth objectives; a culture of coaching, seller dev, and knowledge sharing is prevalent	Revenue enablement is a strategic differentiator ; coaching, mentoring, seller dev programs develop future GTM leaders
Technology / Infrastructure	There is no sales enablement platform in place; all enablement lives disparately across the organization	Sales enablement platform in place ; unorganized and/or outdated with disparate usage across GTM organization; key enablement lives in silos	Sales enablement platform is adopted across the GTM organization ; content is organized, maintained and easily-actionable	Sales enablement platform experience is customized by role and development needs; content usage tracked and actioned upon	Revenue enablement tech ecosystem with integrated enablement platform, LMS, and CRM to enable JIT, role specific content delivery; continuous content refresh process in place
Alignment	No alignment between sales enablement and seller development needs. Sales and Marketing message to market is misaligned.	Minimal sales / marketing alignment ; little to no alignment between sales enablement and sellers needs.	High level Sales & Marketing alignment on messaging and sales strategy; Enablement develops content / tools to support seller needs	Sales & Marketing collaborate on content development and messaging. Continuous feedback loop between enablement and the sales org	There is a consistent message to the market ; cross-functional governance exists to assess market feedback and revise messaging and selling strategy
Enablement Programs & Content	Basic onboarding support ; minimal job aids, selling tools, and documented product/market knowledge exists	Basic onboarding, continuous development , and product enablement exists; usage varies by geo and sales team	Enablement programs develop and train to a consistent selling approach ; supporting content and job aids enable seller productivity	There are vertical and use case specific enablement programs ; extended learnings paths focused on business acumen & value selling	Enablement programs accelerate onboarding and support continuous skill development for all GTM resources
Processes	There is no defined sales process	Sales process is defined but misaligned with buyer journey and does not reflect organization's growth strategy	Sales process is aligned to buyer's journey and organizational growth strategy; enablement structured to support sellers by sales stage	Technology enables proactive content and job aid distribution to the seller's dependent on stage of their opportunities	Cross-functional governance exists to ensure continued alignment of sales process with the buyer journey and enablement content/support
Metrics & Results	Metrics and KPIs aren't defined. No central data or metrics tracking repository. MQLs, SAOs, ROI not tracked - Attrition rate: > 75% - Ramp time: 9-12 Months - Win rate: < 25 % - Average Deal Size: Lags market - Seller Productivity: Lags market	Sales enablement success metrics unknown and not tracked. Revenue tracked but not tied to goal. MQLs, SAOs, ROI not tracked - Attrition rate: 73% - Ramp time: > 9 Months - Win rate: 30% - Average Deal Size: At market - MQL : SAO Conversion: 16% - SAO : Win: 46%	Sales enablement metrics measuring sales productivity and effectiveness, but not regularly monitored . MQLs, SAOs, ROI not tracked - Attrition rate: 50-60% - Ramp time: 6-9 Months - Win rate: 30-35% - Average Deal Size: At market - Seller Pipeline Developed 33% of 5-6x - MQL : SAO Conversion: 30-40% - SAO : Win: 45-55%	Sales enablement metrics regularly tracked and reviewed ; tracking of influenced revenue, deal conversion, ADS increase, MQLs, SAOs, ROI begins - Attrition rate: 20 – 25% - Ramp time: 6 – 9 Months - Win rate: 30 – 35% - Average Deal Size: Exceeds market - MQL : SAO Conversion: 40-50% - cross-sell / Up Sell: 40% - SAO : Win: 55-65%	Sales enablement metrics give highly accurate visibility into team's performance. Closed loop reporting system for all campaigns and metrics - Attrition rate: 20 – 25% - Ramp time: 6 Months - Win rate: > 35 % - Average Deal Size: Leading market - MQL : SAO Conversion: 50-60% - cross-sell / Up Sell: 50% - SAO : Win: 65-75%