



Executive Assistant Onboarding

Zephyr Lee, Executive Assistant to the CEO

April 26, 2021

Day One Will be Meeting the Team at the Weekly Executive Meeting

Welcome to Bambee, Zephyr!

We are very excited to have you on the team! Here is your agenda for your first day:

11:30am Onwards

Weekly Executive Meeting
3405 Glendale Blvd, Unit D, Los Angeles, CA, 90039

(Your safety and comfort are very important and all precautions are being taken in alignment with CDC and California Department of Public Health guidelines).



Day Two Is About Providing You a Foundation & Key Introductions

You will go through our virtual onboarding process, learning more about Bambee, our history, and how we do business

Orientation - Introduction to Bambee

Brian Morrison - Learning and Development Director

Orientation Part 1 & 2

New Customer Reg Flow & App Demo

Bambee HR Methodology

Administrative - Gusto & Important Information

Meet with Halima Muhammad, Director, People

“ The way that I look at it is:
Covid acted as a giant, year-
long Super Bowl ad about how
businesses need HR.”

Allan Jones
CEO, Bambee



The Remainder of Week One Is About Creating Context to Ensure Success

Throughout the week you will get to meet the rest of the Leadership Team. These teammates lead our front line in Strategy, HR Accounts, Sales, Product, Data and Engineering. Your week will end with a little housekeeping then Happy Hour with the Executive Team

Week One Introductions Continued

Wednesday

Kyla Brennan, Chief Commercial Officer
Steven Gross, SVP, Finance
Scott MacDonell, Chief Marketing Officer
Matt Goldsmith - Director, Strategy & Ops

Thursday

Justin Low - SVP, Employee Experience
Leon Tchikindas - VP, Data
JB Dela Cruz - VP, Sales
Claudia Jaimes - Director, HR Accounts

5pm - Company Happy Hour [Via Zoom](#)



Meet the Teams & Leaders

Your first week is structured around providing key intros and context that will set you up for success

Meet the Bambee Leadership Team

Executive Team	Directors
Allan Jones - Chief Executive Officer	Claudia Jaimes - HR Accounts
Zephyr Lee - Executive Assistant to CEO	Brian Morrison - Learning & Development
Paul Sternhell - Chief Customer Officer	David Chau - Customer Acquisition
Mike Ruangutai - Chief Technology Officer	Halima Muhammad - People
Kyle Brennan - Chief Commercial Officer	Matt Goldsmith - Operations & Strategy
Scott MacDonell - Chief Marketing Officer	
Steven Gross - SVP, Finance	
Justin Low - SVP, Employee Engagement	
Leon Tchikindas - VP, Data	
JB Dela Cruz - VP, Sales	
Chris Lavender - VP Engineering	

Meet Our Founder & CEO



Allan Jones

Bambee Founder & CEO
Founded 2016

Team Makeup

Executives: **9**

Product: **25**

Total Company Size: **100**

“Bambee was founded on the disruptive idea that every business should have access to an affordable human resources manager and every business can run like a Fortune 500 Company.”

Overview

In addition to overseeing all key functions of the company, Allan’s key focuses in 2021 are centered around creating a strong company narrative and ensuring the company vision is fully understood and realized in every product and feature we deliver.

Allan is structuring company efforts to tie them to our vision, creating a strong narrative and recruiting top talent to the business.

Product is responsible for building out the product strategy and supporting road map and features both internally and externally.



HR Accounts & Sales Teams Are 60% of Our Company Count

Key Leaders



Paul Sternhell
Chief Customer Officer
Joined Feb 2019



JB Dela Cruz
VP, Inside Sales
Joined Mar 2021



Claudia Jaimes
Director, HR Accounts
Joined Nov 2018

Team Overview

Customer represents the Dedicated HR Manager to Bambee's 5K subscribers. HR Account Managers Provide HR guidance, an excellent customer experience, and education on our products and services. The team currently makes up nearly 40% of all Employees.

Sales is responsible for developing strategies to close leads driven by the Marketing team. The Sales team consists of Sales Development Reps, HR Advisors for our smaller customers, and Account Executives that focus on customers over 20 employees,

Team Makeup

Customer / HR Accounts: **38**

Sales: **25**

Core Key Performance Indicators

Customer: Onboarding, Discovering HR Issues, HR Issues Resolved

Sales: New Bookings, Quota, Pipeline Performance, Lead Caps



Meet the Development and Data Team

Key Leaders



Mike Ruangutai
Chief Technology Officer
Joined May 2020



Leon Tchikindas
VP, Data
Joined May 2019



Chris Lavender
VP, Engineering
Joined April 2021

Team Makeup

Engineering: **18**

Data: **2**

Team Overview

Engineering is responsible for development and operations of Bambee's technology products. This includes both the customer facing product as well as internal tools and integrations supporting the operations teams.

The **Data** team provides end to end service to the company for all of its data needs. From advising on the data models that underpin Bambee's product architecture, coding the math necessary for paying out Account Executive variable compensation, to build and maintaining the source of truth in Bambee's analytic warehouse.

Core Key Performance Indicators

Story points, unit test coverage, architecture standards, production bugs per release



Meet our Marketing Team

Key Leaders



Scott MacDonell
Chief Marketing Officer
Joined April 2021



David Chau
Director, Customer Acq
Joined March 2019

Team Overview

The **Marketing** team is focused on driving customer acquisition through audio and digital marketing channels. They are responsible for driving high-intent leads and developing and optimizing email campaigns that increase engagement and generate subscriptions. The marketing team will also be responsible for earned and owned media and optimizing the conversion funnel.

Team Makeup

Acquisition: **2**

Email/Retention: **1**

Core Key Performance Indicators

Leads, Cost per Subscription, Cost of New ARR



Meet the Finance, Internal HR, & Legal Teams

Key Leaders



Steven Gross
SVP Finance
Joined May 2020



Halima Muhammad
Director, People
Joined February 2019



Justin Low
SVP, Emp Experience
Joined April 2018

Team Overview

Finance ensures teams have the resources they need to be successful. Finance also plays a critical role in driving key insights as part of their principle of GEI (guidance, enforcement, and insights) to ensure the company stays on the right path.

Internal HR at Bambee is focused on creating The Most Authentic Employee Experience, centered around meaningful feedback, candor, meritocracy, and a holistic investment in people. The team is responsible for ensuring that we are compliant in all aspects of HR while attracting, developing and retaining company talent.

Core Key Performance Indicators

Finance: Churn, Cost Per Net New ARR, LTV to CaC

Internal HR: Employee NPS, turnover rate, diversity

Team Makeup

Finance & Accounting: **3**

HR & Employee Experience: **4**

Legal: **1**



Meet Our Commercial & Strategy Teams

Key Leaders



Kyla Brennan

Chief Commercial Officer
Joined Mar 2021



Matt Goldsmith

Director, Strategy
Joined Nov 2017

Team Makeup

Commercial / Strategy: **3**

Compliance: **3**

PR: **1**

Team Overview

Strategy oversees the development, launch and management of new initiatives inside if the organization. Today, our core focus us the launch of Bambee platform products, payroll and training.

Commercial, working alongside the CEO, helps ensure our company is aligned against our roadmap and longer-term vision. Both the Commercial & Strategy teams help galvanize the organization to ensure we're hitting our ambitious goals.

Core Key Performance Indicators

Strategy: 20% adoption of payroll product by year-end

Commercial: Successful launch and tracking against company roadmap



Key Topics of Discussion

To get maximize the value from your conversations with key leaders, we recommend you hit the following topics

Major Topics to Cover With Leadership Team

Marketing (Scott & David):

- Audio & digital advertising philosophy & strategies to date including performance by channel
- Insights learned from scaling in 2020 and how we're forecasting leads with more precision
- Current email marketing strategy
- Prior conversion rate optimization efforts and areas of opportunity
- Main KPI's currently tracking performance against & key reports

Customer (Paul, Claudia, & Kyla):

- Our customer profile and how they engage with our product and their HR Account Manager
- Team structure and infrastructure overview
- Our strategy around scaling service and technology to serve our customers
- Customer retention and engagement; what we're currently doing to drive discovery of HR issues with customers

Sales (JB Dela Cruz & Joey):

- Current sales team structure and strategy
- Relationship with marketing and how team leverages inbound lead predictability to create hiring plans and enforce lead caps
- Opportunities around re-engaging stale/pipeline leads & outbound strategies in the works
- Lead funnel and the current sales cycle process
- Self signup and the opportunity to expand this

Major Topics to Cover With Leadership Team

Development & Data (Mike & Leon):

- Team structure and release process
- How dev currently supports Bambee
- Available data from marketing channels in our warehouse
- Current reporting, attribution models, and what's in the roadmap for marketing & data

Finance/Legal & HR (Steven, Halima, & Justin):

- Bambee KPI overview and historic performance
- Marketing budget for 2021 and how we forecast spend & results
- Company-wide goals for 2021
- Overview of people team & company values
- Internal HR processes

Strategy, PR, & HR Compliance (Matt):

- PR strategy for 2021
- Payroll product rundown & go-to-market strategy
- How we're automating intake from customers and working towards more consistent service from HR Account Managers

The Bambee Vision



OUR LONG-TERM VISION

Freedom of Work

Decouple career equity from a single workplace creating frictionless, free-flowing, and progressive employment.

We Achieve This in Three Phases



Phase 1: Small Business Freedom

Unlock small business potential in America by creating as much relief as possible. Freedom is achieved through Bambee's suite of products including dedicated HR managers, compliance, training, insurance, and mistake-free payroll.



Phase 2: Benefit Fairness

Level the benefit playing field; provide employees of small companies the opportunity to access the same benefits as Fortune 500 companies.

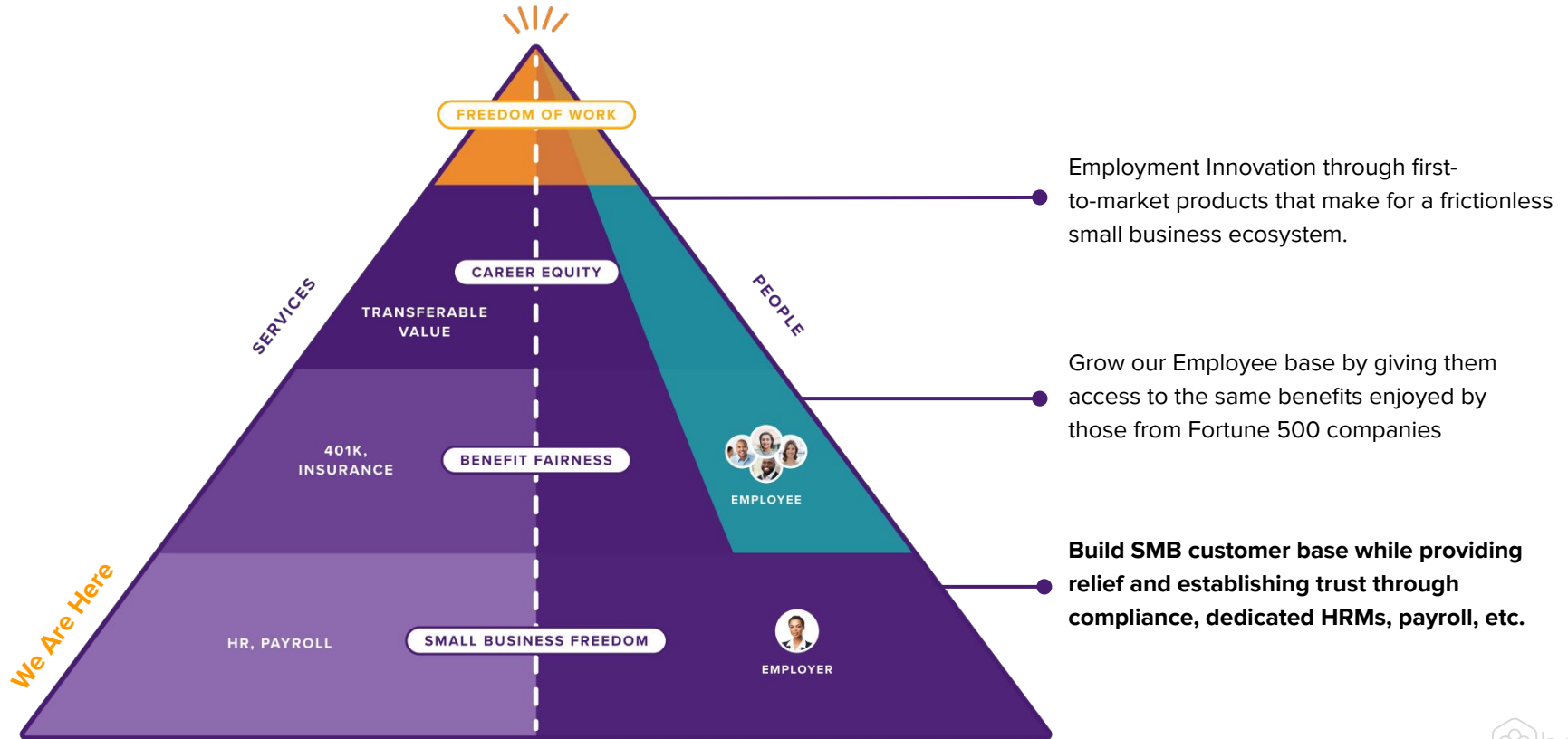


Phase 3: Career Equity

Transferable value you build throughout the duration of your career from your performance to compensation to benefits.

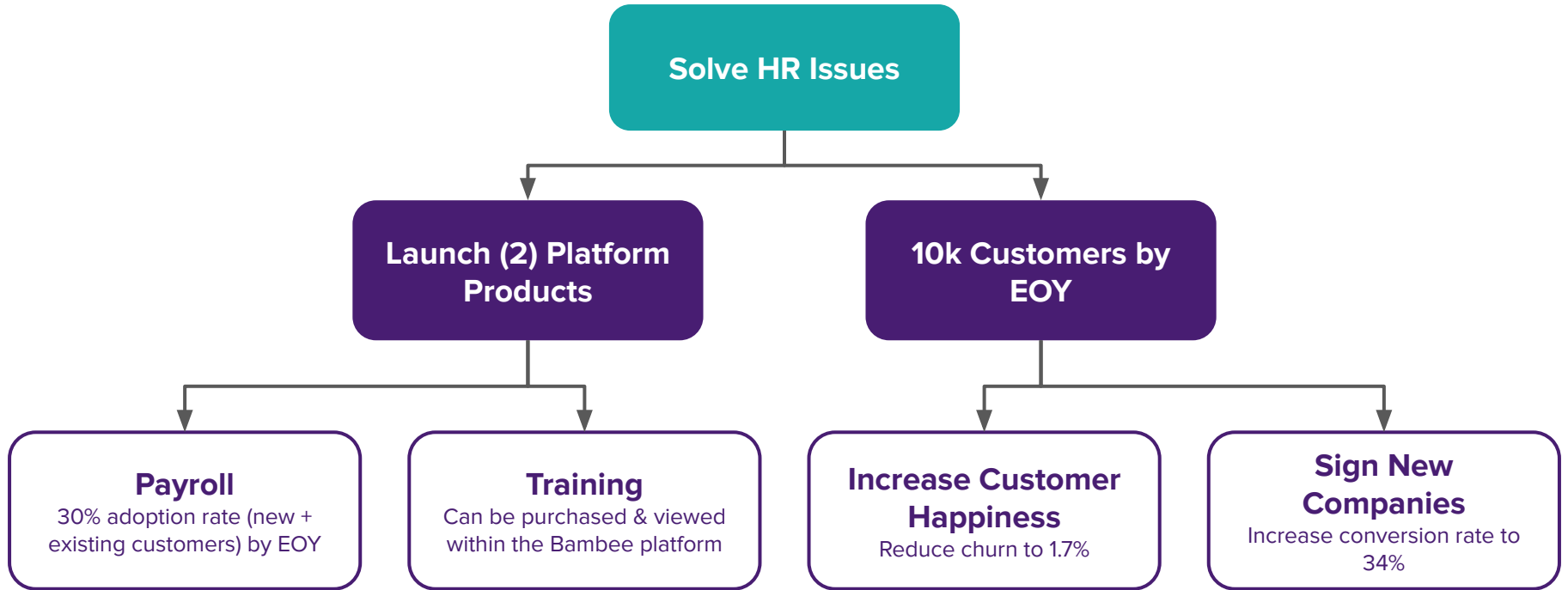
What We're Focused on in 2021

Our Core Focus in 2021 is Building a Strong Foundation & Creating Small Business Freedom



To Achieve Small Business Freedom

We Will Fearlessly Solve Even the Most Complex HR Problems For Small Business



Resources



Systems & Tools

System / Tool	Purpose
Honey	Bambee platform administration (eg processing termination requests, sending policies for signature, reviewing report cards submitted by our customers, or administering HR Audits)
Salesforce	Salesforce allows Bambee to better connect with customers, partners and potential customers. The tool is mainly utilized by the Bambee sales team. We also use Sales Cloud for support tickets that allows both the HR Accounts team & sales team to work out of one system.
Sisense / Periscope	Periscope is a Business Intelligence platform connected to our analytics warehouse for the purpose of operational and investigative data crunching and reporting. Data from all our key systems can be visualized in this tool.
KPI Dashboard	The KPI dashboard is a specific Google Sheet, maintained by the finance and data teams, which aggregates data across multiple sources for the purposes of goal setting and reporting in company-wide leadership meetings. Metrics include things like cost per lead (CPL), refund rate, new business bookings, and churn.
Leadership Meeting Archive	Warehouse for all past Leadership decks and notes.

Key Employee Resources

Resource	Purpose	Contact Information
Gusto	Payroll, Benefits and Compliance	https://gusto.com
Blue Shield	Employee Medical Plan	800.393.6130
Kaiser	Employee Medical Plan	800.464.4000
Guardian	Employee Vision and Dental Plans	800.627.4200
Expenses	Submit expenses for approval and reimbursement	https://forms.gle/r4VemofTURqw5meV9
ForUsAll	Company 401K Administrator	https://www.forusall.com/
Carta	Company Stock Administrator	https://carta.com
Allan Jones Zoom	Allan's dedicated Zoom meeting room - Bambeeceo	https://bambee.zoom.us/my/bambeeceo