

Align Product Vision

Where We're Headed

While you wait for the webinar to begin, submit your questions !



align

Doug Walner

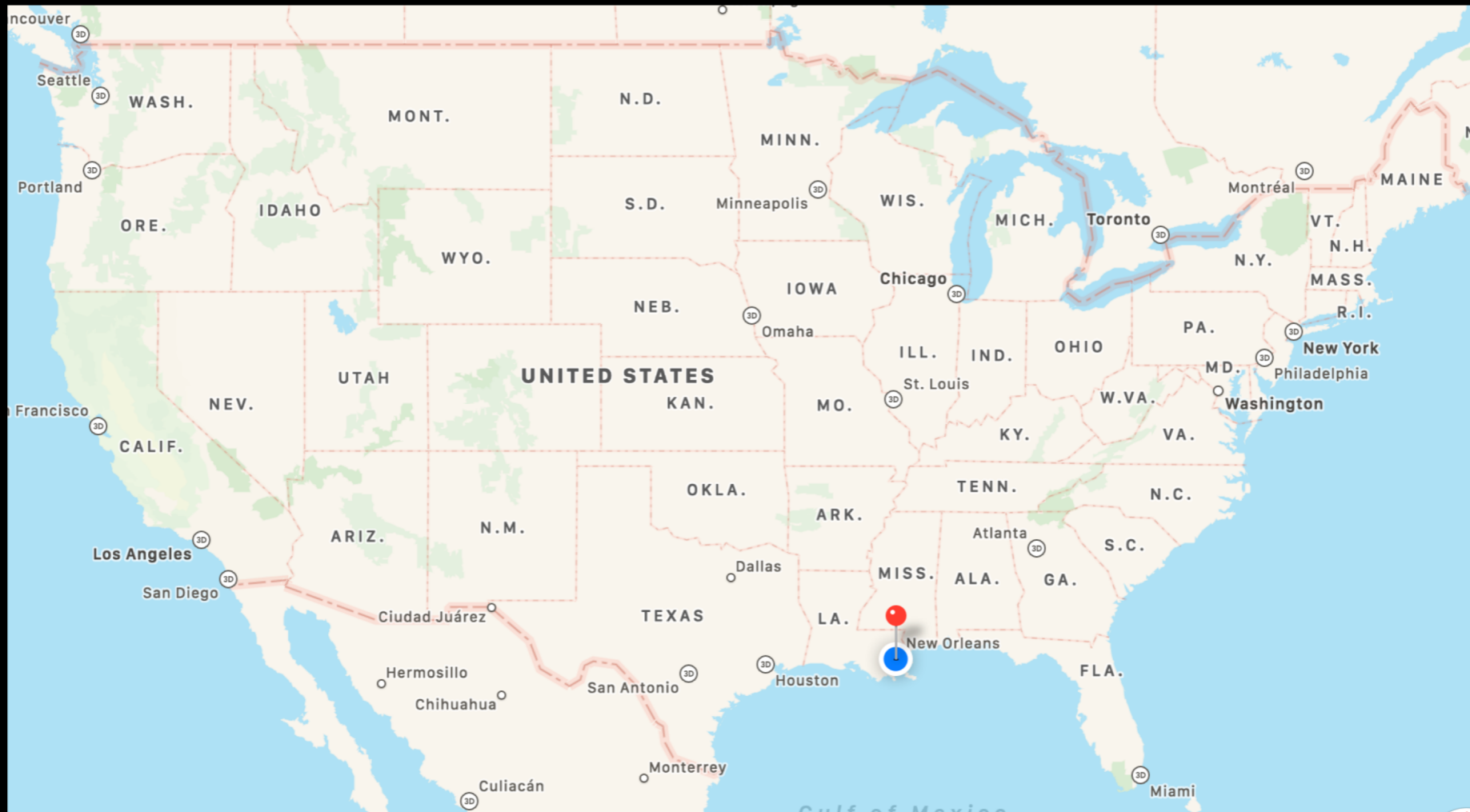
CEO, Align

Core Purpose

Aligning Companies And
Their People On Their
Journey To Success



Align is located in New Orleans, Louisiana



Customer Success and Technical Support

The screenshot displays the Align software interface. The top navigation bar includes the Align logo, a 'Back to Classic' link, and menu items for 'Strategic Tools', 'Reports', 'Administration', and 'TestCo'. A user profile icon and a 'STUCKS 3' indicator are also present. The left sidebar contains navigation options: 'My Dashboard', 'Company Dashboard', 'Priorities', 'Daily Huddle', 'Weekly Huddle', 'Tasks', 'Top Priority Calendar', 'Stucks', 'Suggestions', and 'Invite Team'. The main content area is titled 'Company Dashboard' and features a 'Critical Numbers' section for the period '1/1/2019 - 3/31/2019'. The metrics shown are: GROSS MARGIN = 30% (20), REFERRALS = 100 (65), UTL RATE = 85% (85), NEW CUSTOMERS = 50 (21), and QUARTERLY REVENUE, U.S. (THOUSANDS) = \$600 (530,000). Below this is a 'Company Priority Insights' table with 13 columns representing weeks. The table lists several priorities with progress bars: '#1 Thing - Increase eNPS by 10 (From 75 to 85)', 'Create \$1,200,000 in new sales by end of Quarter', 'Sales Team hitting 50% conversion', 'Decrease Client Onboarding Time to Two Months', 'Evaluate 20 businesses for potential acquisition (Comple...', and 'Implementation of new EHR platform'. A 'Company Priorities Overview' section at the bottom shows the '#1 Thing - Increase eNPS by 10 (From 75 to 85)' with a progress indicator of 83%. A red circle highlights a 'Contact Us' button in the bottom left corner of the interface.

| Week | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
|---|-------|-------|-------|-------|--------|--------|--------|--------|--------|--------|--------|----|----|
| #1 Thing - Increase eNPS by 10 (From 75 to 85) | Green | Green | Green | Green | Yellow | Green | Green | Green | Green | Green | Yellow | | |
| Create \$1,200,000 in new sales by end of Quarter | Green | Green | Green | Green | Green | Green | Green | Yellow | Green | Yellow | Yellow | | |
| Sales Team hitting 50% conversion | Green | Green | Green | Green | Green | Green | Yellow | Green | Yellow | Yellow | Yellow | | |
| Decrease Client Onboarding Time to Two Months | Green | Green | Green | Green | Green | Green | Green | Green | Green | Yellow | Yellow | | |
| Evaluate 20 businesses for potential acquisition (Comple... | | | | | Green | Yellow | Green | Yellow | Yellow | Yellow | Yellow | | |
| Implementation of new EHR platform | | | | | | | | | Yellow | Yellow | Yellow | | |

Joey Muething

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Let's Talk!

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Company Priority Insights ⌵



Week

1 2 3 4 5 6 7 8 9 10 11 12 13

#1 Thing - 186 New Paid Companies!



NPS score of 0



Increase Internal Use of Align & Rock Habits



Vision

Built-in coach

Health check over coffee

Value scales with size

Team empowerment

Minimal time spent

Transparent evaluation

Topics

Features to Support Larger Teams

Team Contribution and Transparency

Insights and Guidance

Larger Teams

Team Tags



Smaller strategic planning and priorities within the larger organization via tags

Public or private visibility

Flexible team membership

Leadership team, physical offices, working groups

Measure Effectiveness



Report Cards for 1:1 employee reviews

Alignment Checklist features

Update information on-the-go



Focus on mobile app

Improved text entry

Alerts

Notifications

Meeting Summaries

Contribution and Transparency

Calendar View



Consolidates tasks, stucks and daily top priorities

Team member search

Combined calendar view

Accomplishments Feed



Recognition for contributing to priorities

Public activity feed

Available on Company Dashboard and Huddles

Notifications



Expanded and customizable alerts

E-mail and mobile push notifications

Huddle summaries, priority progress, team activity, etc.

Insights and Guidance

Huddle Search

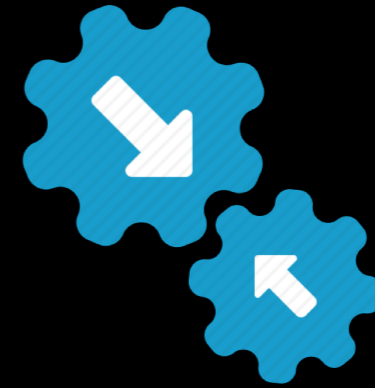


Find info from previous meetings

Search across all or specific Huddles

Keyword and team member search

Integrations



Existing integrations



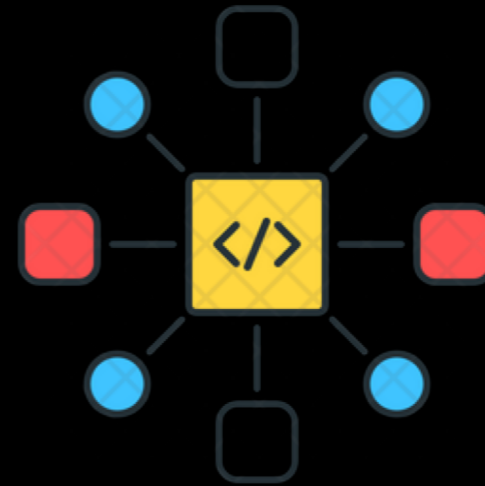
Focus on task management
tools



Sales tracking tools



API



Align standard data API

Export to your dashboard tools

Integrate into automation platforms

Huddle summaries for Slack



Q&A

align

The word "align" is written in a lowercase, rounded, grey font. Below the letters 'i', 'l', and 'g' are three small, solid orange circles arranged horizontally.

Let's Talk!

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