

ICONIQ

ICONIQ ANALYTICS & INSIGHTS

Engineering Efficiency

November 2021

ICONIQ Capital, LLC

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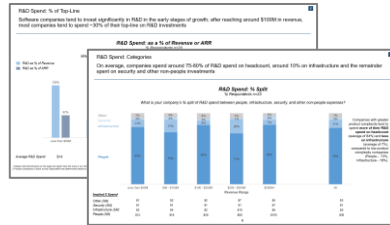
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Executive Summary

1

R&D Spend

Pages 4 - 7

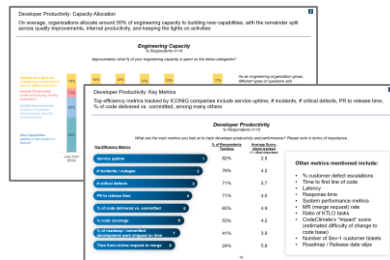


- Software companies tend to make **aggressive investments in R&D in the early stages of growth, with R&D spend on average being ~130% of revenue**
- As companies scale, they are able to get increasing leverage out of R&D OpEx: after achieving ~\$100M in revenue, **most companies tend to spend closer to 30% of their annual top-line on R&D**
- On average, **75-80% of a company's R&D spend goes toward headcount**, 10% towards infrastructure, and the remainder towards security and other non-people investments

2

Developer Productivity

Pages 8 - 11

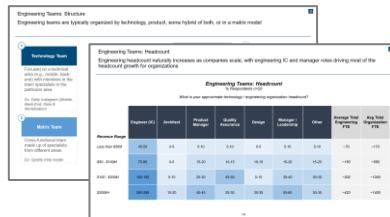


- As an engineering organization grows, companies must tackle different phases of questions and challenges related to investments in both time and people; it's critical to have a **framework in place that allows the company to discuss and prioritize engineering capacity**
- On average, organizations **allocate around 60% of engineering capacity to building out new capabilities**, with the remainder split across quality improvements, internal productivity, and keeping the lights on
- Top efficiency metrics tracked by surveyed companies include **service uptime, # incidents, # critical defects, PR to release time, % of code delivered vs. committed, among many others**

3

Engineering Teams

Pages 12 - 16

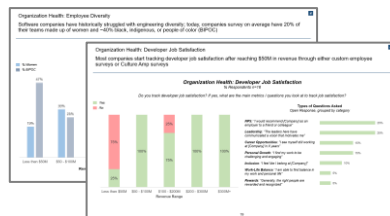


- Most software companies tend to have their developer teams **organized by product teams** (e.g., teams based on a product or persona), with **average engineering team size ranging from 5-8 FTEs**
- We also see some companies structure their engineering teams through a **matrix model, by technical expertise, or some combination of product and technology**
- Engineering team makeup tends to shift toward **more back-end and full-stack engineers as companies scale**

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Organization Health

Pages 17 - 19



- Software companies have historically struggled with diversity on their engineering teams. Today, surveyed **teams are made up of ~20% women**
- Average engineering employee **tenure is around 2 years**, with most companies seeing **average annual attrition for engineering teams of ~10%**
- Most companies start **tracking developer job satisfaction after reaching \$50M in revenue**

Methodology

The following study is based on quantitative surveys from select companies in the ICONIQ Growth portfolio and qualitative perspectives from our Technical Advisory Board

METHODOLOGY AND RESPONDENT MAKE-UP

Proprietary survey of CTOs, CFOs, and Heads of Engineering at ICONIQ Growth portfolio companies conducted in September 2021

Perspectives from the ICONIQ Growth Technical Advisory Board



Aditya Agarwal

Former CTO at Dropbox
(Cove, Facebook)



Matt Eccleston

Former VP Growth at
Dropbox (VMware)



Anantha Kancherla

Head of AI Infrastructure at
Facebook (Lyft, Dropbox)

PARTICIPATING COMPANIES



R&D Spend: % of Top-Line

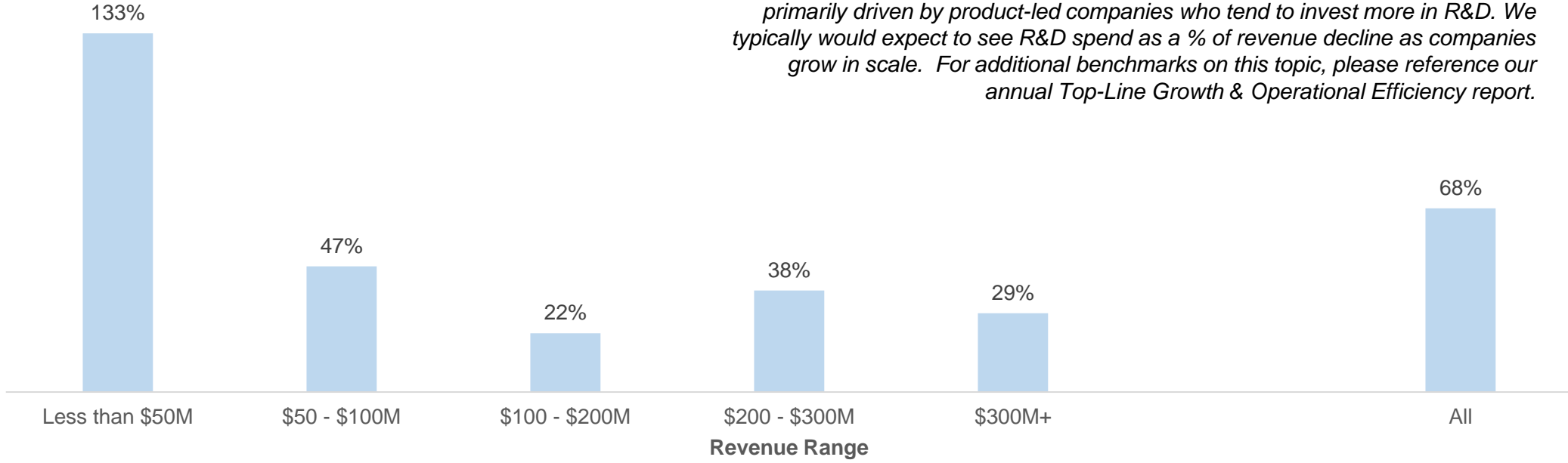
Software companies tend to invest significantly in R&D in the early stages of growth; after reaching around \$100M in revenue, most companies tend to spend ~30% of their top-line on R&D investments

R&D Spend: as a % of Revenue

Select Respondents, n=22

What is your estimated 2021 R&D spend and approximate annual revenue?¹

Please note the small sample size in the \$200M+ revenue bucket here which is primarily driven by product-led companies who tend to invest more in R&D. We typically would expect to see R&D spend as a % of revenue decline as companies grow in scale. For additional benchmarks on this topic, please reference our annual Top-Line Growth & Operational Efficiency report.



Average R&D Spend (\$M)	\$14	\$31	\$29	\$85	\$129	\$43
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¹ Please note benchmarks on this page are higher than the ones in our 2021 Growth & Efficiency report since the datapoints in our prior report are quarterly averages up to 1Q21, whereas the ones provided here are 2021 year-end estimates

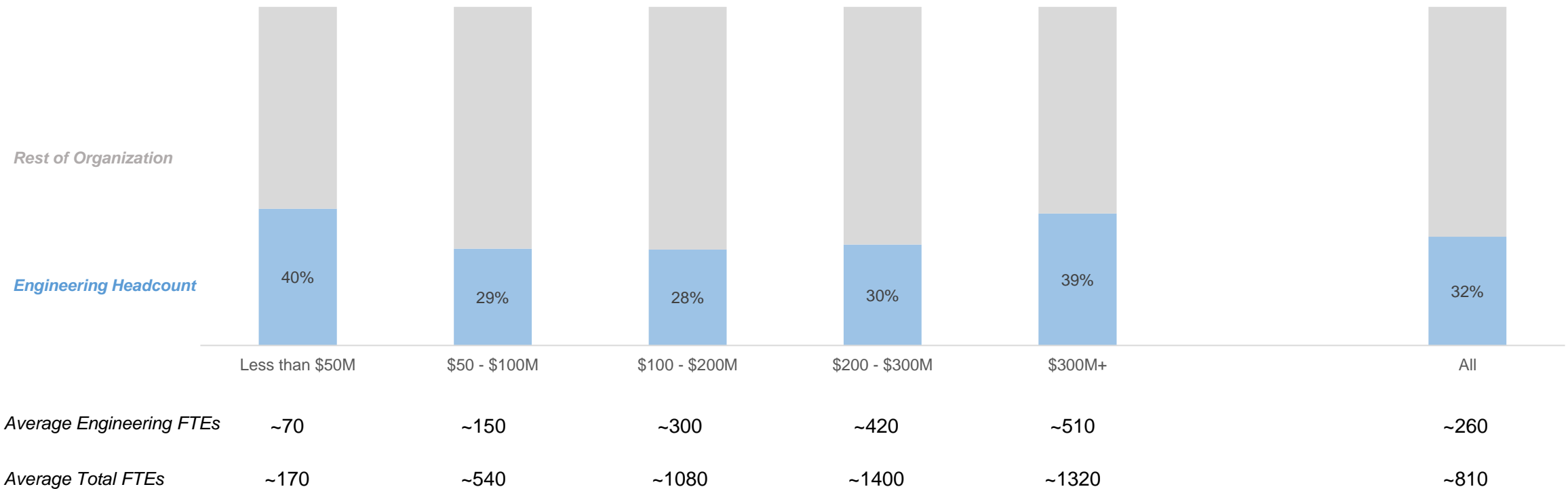
R&D Spend: Headcount as % of Total

R&D headcount tends to make up around 30% of total organization, with slight spikes in the earlier and later stages of company growth

R&D Headcount as % of Total

Select Respondents, n=22

What is your approximate technology / engineering organization and total organization (full company) headcount?



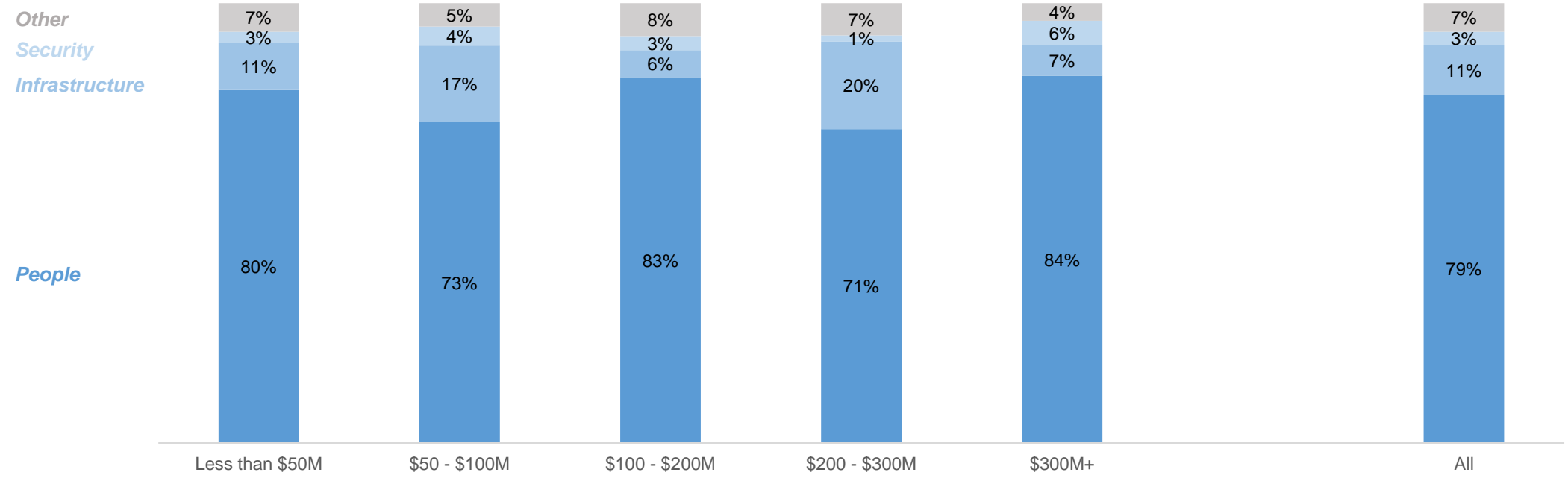
R&D Spend: Categories

On average, companies spend around 75-80% of R&D spend on headcount, around 10% on infrastructure and the remainder on security and other non-people investments

R&D Spend: % Split

Select Respondents, n=22

What is your company's % split of R&D spend between people, infrastructure, security, and other non-people expenses?



Implied Annual \$ Spend

	Less than \$50M	\$50 - \$100M	\$100 - \$200M	\$200 - \$300M	\$300M+	All
Other (\$M)	\$1	\$2	\$2	\$7	\$5	\$3
Security (\$M)	\$1	\$1	\$1	\$1	\$7	\$1
Infrastructure (\$M)	\$2	\$4	\$2	\$19	\$9	\$5
People (\$M)	\$12	\$18	\$28	\$68	\$105	\$36

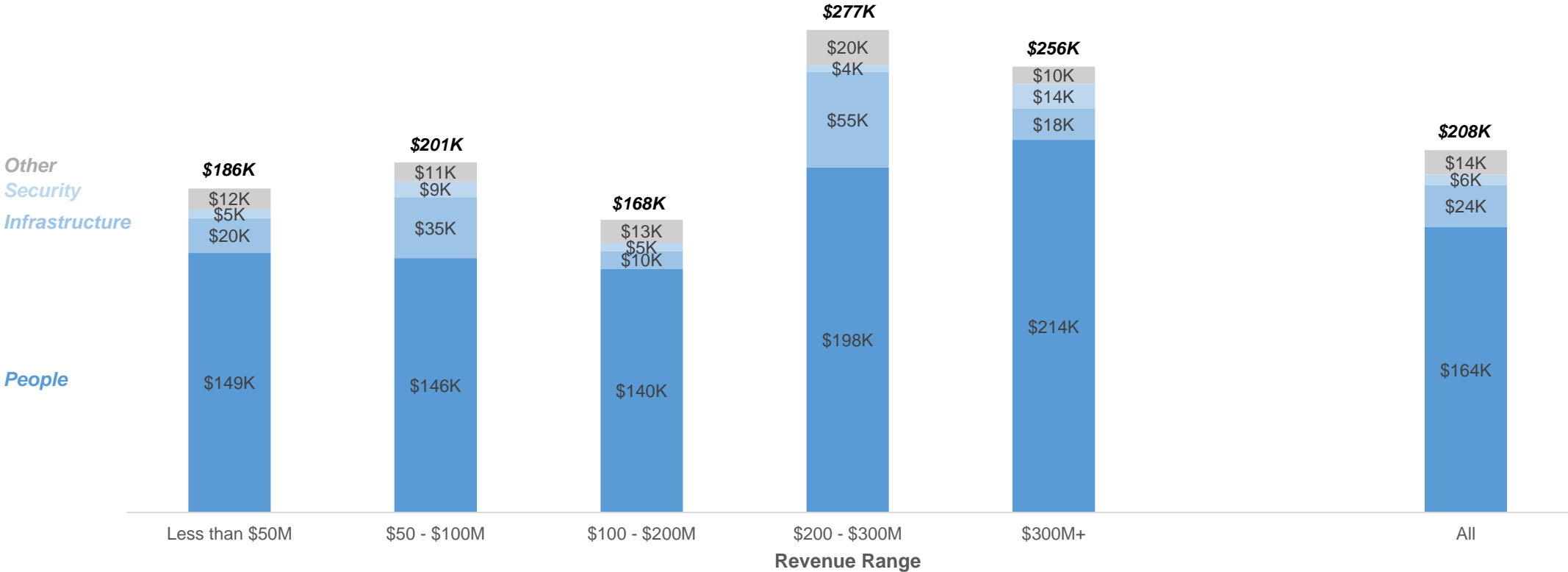
R&D Spend: Implied Spend Per R&D FTE

Survey respondents under \$200M revenue spent around \$168-\$200K on R&D per FTE, whereas later-stage companies post \$200M revenue spent up to \$277K per FTE

Implied R&D Spend per R&D FTE

Select Respondents, n=22

Please note the small sample size in the \$200M+ revenue bucket here which is primarily driven by product-led companies who tend to invest more in R&D. We typically would expect to see R&D spend per FTE decline as companies grow in scale. For additional benchmarks on this topic, please reference our annual Top-Line Growth & Operational Efficiency report.



Developer Productivity: Capacity Allocation

Engineering organizations should allocate and prioritize capacity using a standard framework that makes sense for both engineering and the rest of the business

As an engineering organization grows, different types of questions and challenges start to emerge around the investments in time and people your organization is making.

It's critical to have a framework in place that allows the company to talk about and prioritize engineering investments in a way that makes sense for engineering internally and is also understandable for the rest of the business. We recommend the below framework to categorize and track engineering investment.

KEEP THE LIGHTS ON (KTLO)

This is defined as the minimum tasks required to maintain the current level of service in the eyes of our customers

For example:

- Maintaining current security posture
- Maintaining current levels of service uptime
- Service and ticket monitoring & troubleshooting
- Addressing functional defects reported by customers
- Regular/routine internal procedures
- Staying up to date with external dependencies
- Browsers, libraries, platforms, web services, partner changes, hardware, etc.

ELECTIVE INVESTMENTS

New Capabilities

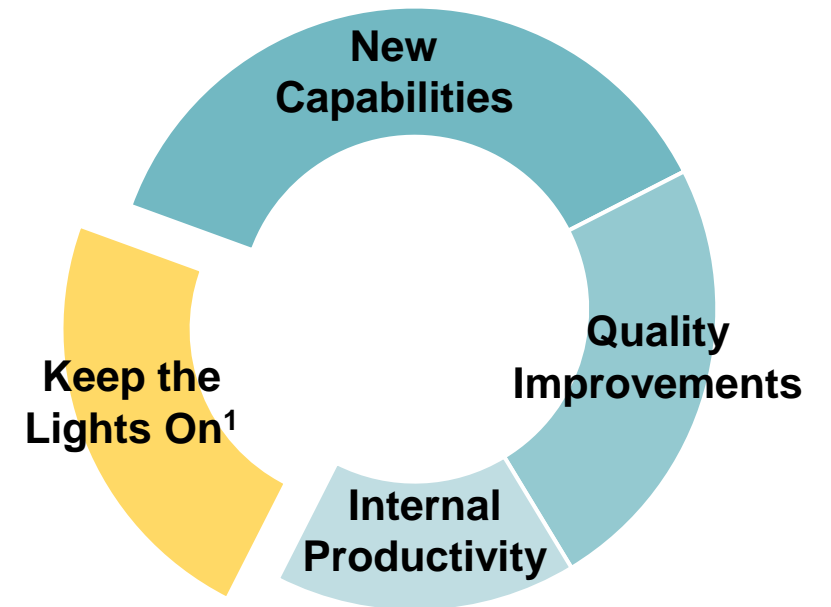
- Adding a new product
- Adding a new feature or sub-feature
- Supporting a new platform or partner application

Quality Improvements

- Customer requested improvements
- Better performance / utilization
- Iterations to improve adoption, retention, and quality
- Improved product reliability or security

Internal Productivity

- Better developer tooling
- Testing automation
- Code restructuring
- Work to reduce size of *KTLO* bucket in the future



You can read more about our engineering framework [here](#).

¹ Keep the Lights On activities should be viewed as in addition to the rest of development activities – hence why the % capacity is incremental to the 100% sum of internal productivity, quality improvements, and new capabilities

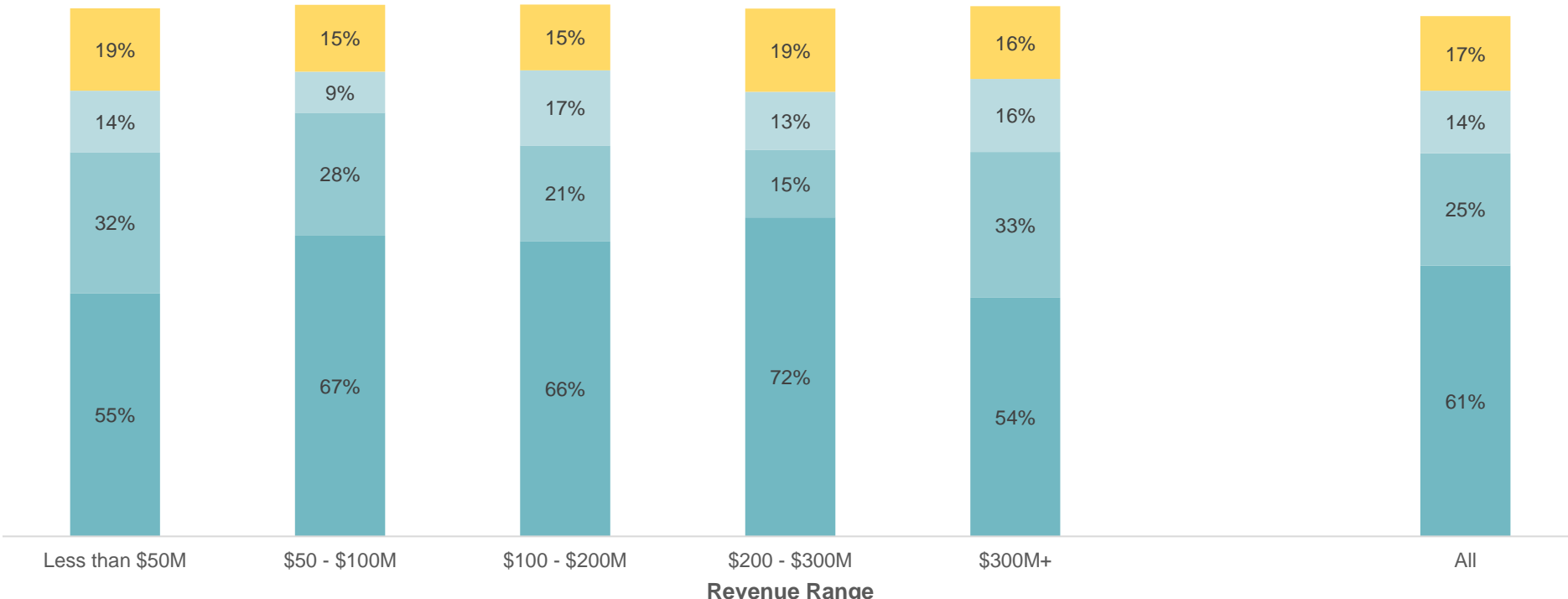
Developer Productivity: Capacity Allocation

On average, organizations allocate around 60% of engineering capacity to building new capabilities, with the remainder split across quality improvements, internal productivity, and keeping the lights on activities

Engineering Capacity Select Respondents, n=16

Approximately what % of your engineering capacity is spent on the below categories?

- Keep the Lights On¹**
(maintaining current level of service, defect resolution)
- Internal Productivity**
(code restructuring, testing automation)
- Quality Improvements**
(customer requested improvements, security enhancements)
- New Capabilities**
(adding a new product or feature)

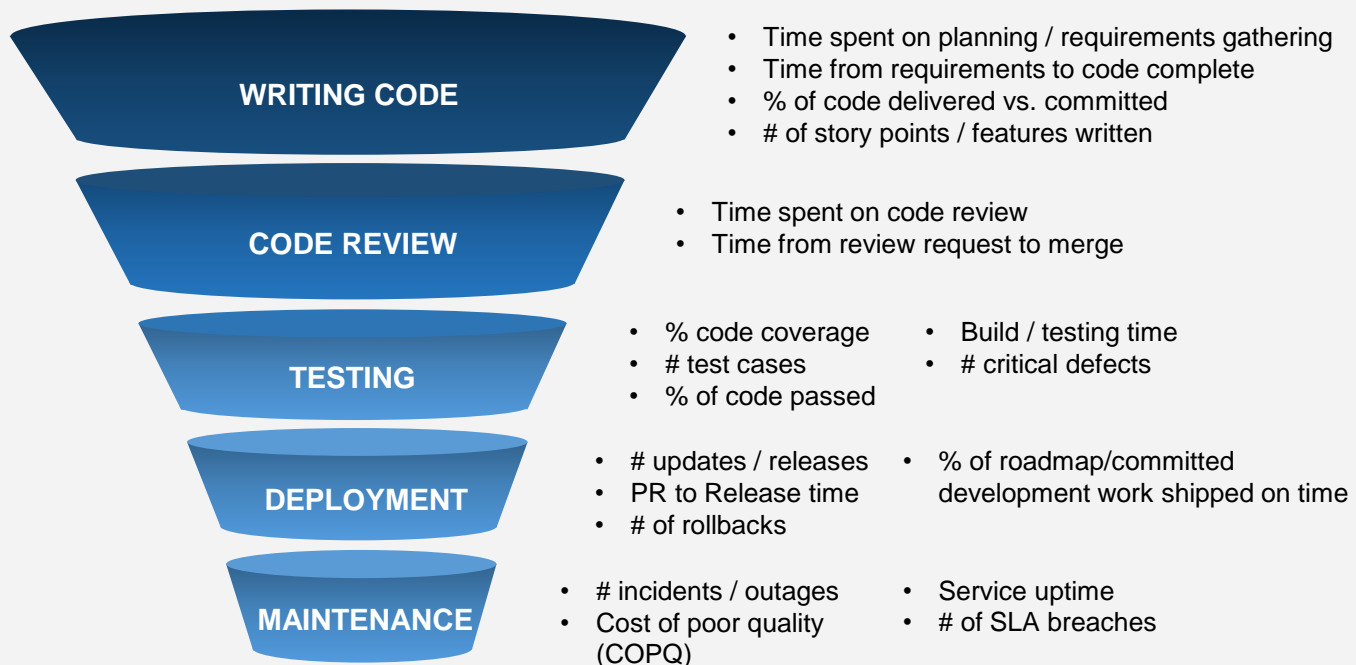


¹ Keep the Lights On activities should be viewed as in addition to the rest of development activities – hence why the % capacity is incremental to the 100% sum of internal productivity, quality improvements, and new capabilities

Developer Productivity: Overview

Just as sales teams measure quotas and ramp time, it is important for the engineering organization to measure developer productivity

EXAMPLE DEVELOPER PRODUCTIVITY METRICS



BEST PRACTICES

- Developer productivity can be compared to a sales funnel, with key **metrics that can be tracked at each stage**
- While specific KPIs will vary across companies, metrics that allow management to understand and **track revenue / FTE cost, release time, and developer velocity on a trended basis** will be critical
- Start by **picking 3 metrics** that are most relevant and critical for your teams
- Rather than tracking every single metric, it's most important to start **building the muscle of reporting and improving on these metrics over time**

Developer Productivity: Key Metrics

Top efficiency metrics tracked by surveyed companies include service uptime, # incidents, # critical defects, PR to release time, % of code delivered vs. committed, among many others

Developer Productivity

Select Respondents, n=16

What are the main metrics you look at to track developer productivity and performance? Please rank in terms of importance.

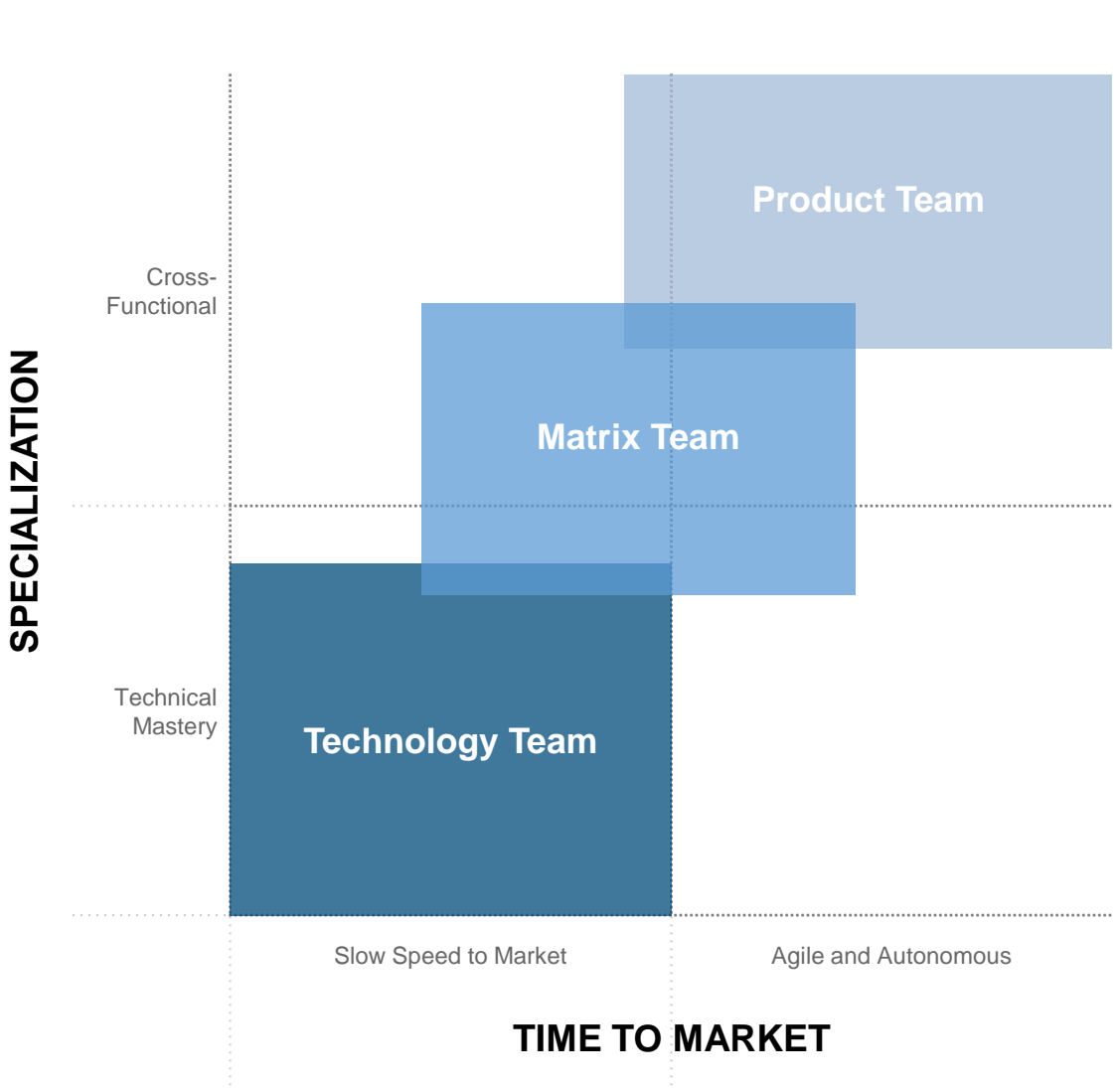
<u>Top Efficiency Metrics</u>	<u>% of Respondents Tracking</u>	<u>Average Score, where tracked</u> <i>(1 = Most Important)</i>
Service uptime 1	82%	2.5
# incidents / outages 2	76%	4.2
# critical defects 3	71%	5.7
PR to release time 4	71%	4.0
% of code delivered vs. committed 5	65%	4.9
% code coverage 6	53%	4.2
% of roadmap / committed development work shipped on time 7	41%	3.9
Time from review request to merge 8	24%	5.8

Other metrics mentioned include:

- % customer defect escalations
- Latency
- Response time
- System performance metrics
- MR (merge request) rate
- Ratio of KTLO tasks
- CodeClimate's "Impact" score (estimated difficulty of change to code base)
- Number of Sev-1 customer tickets
- Roadmap / Release date slips

Engineering Teams: Structure

Engineering teams are typically organized by technology, product, some hybrid of both, or in a matrix model



3 **Product Team**

Organized around a product (or persona) area with the team having all roles needed to build the product and one manager. This type of team is **more likely to build a unified product** and be closer aligned to business success. However, product teams may devote **less time and energy on technical excellence**.

Ex: Airbnb (Guest, Host)

2 **Matrix Team**

Cross-functional team made up of specialists from different areas. This team is usually a temporary project team organized to develop a specific product or feature. This team orientation fosters **closer collaboration across functions** and improves time to market by having **all the required skills to build and deploy in one team**. Conversely, **decision-making may be more difficult** in this structure given multiple reporting lines and team leadership

Ex: Spotify tribe model

1 **Technology Team**

Focused on a **technical area** (e.g., mobile, back-end) with members in the team specialists in the particular area. This team orientation results in **high technical mastery**, which means the team's codebase is likely to be high quality and reduces possibility of technical debt. However, engineering organizations with technology teams may have a **slower time to market** due to the **waterfall development style** required to coordinate across technical teams

Ex: Early Instagram (Mobile, Back-End, Data & Monetization)

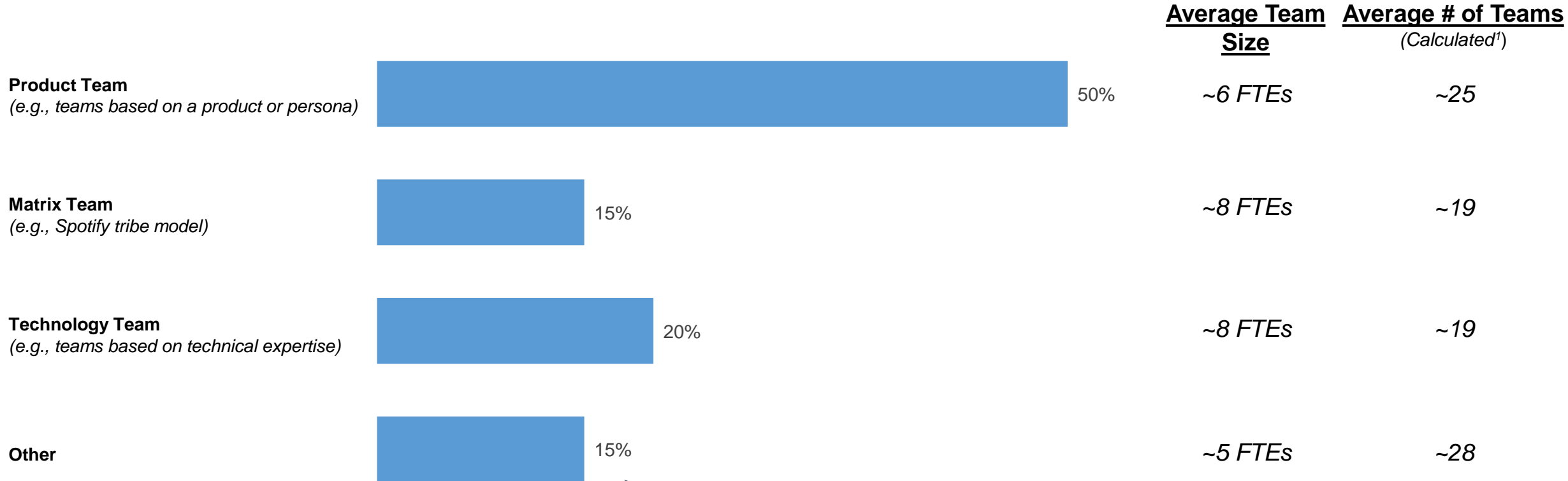
Engineering Teams: Structure

The majority of software companies tend to have their engineering teams structured by product, with average team size ranging from 5-8 FTEs

Engineering Teams: Structure

Select Respondents, n=20

How are your engineering teams structured? What is your average engineering team size (# FTEs)?



"We have a mix of technology teams (platforms) and product teams"
 "We have departments based on function (e.g., development, security, etc.) and within the Development function we are product-oriented with front-end and back-end teams working on the same product"

¹ Calculated based on average engineering IC headcount of 151 FTEs

² The opinions expressed on this page solely represent the views of the respective respondents and are not necessarily the views of ICONIQ Growth


Engineering Teams: Key Ratios

On average, we see ~6 engineers per manager, ~9 engineers per product manager, and ~11 engineers per QA

Engineering Teams: Engineer Ratios

Select Respondents, n=20

What is your approximate technology / engineering organization headcount??

 ~ 5 FTEs

Avg Ratios

Engineer to Manager



~6:1

Engineer to Architect



~40:1

Engineer to Product Manager



~9:1

Engineer to Quality Assurance



~11:1

Engineer to Design



~15:1

These ratios remain relatively consistent regardless of company scale. However, significantly later stage companies with revenue above \$300M will tend to see a higher ratio of engineers to roles across product management, design, and QA

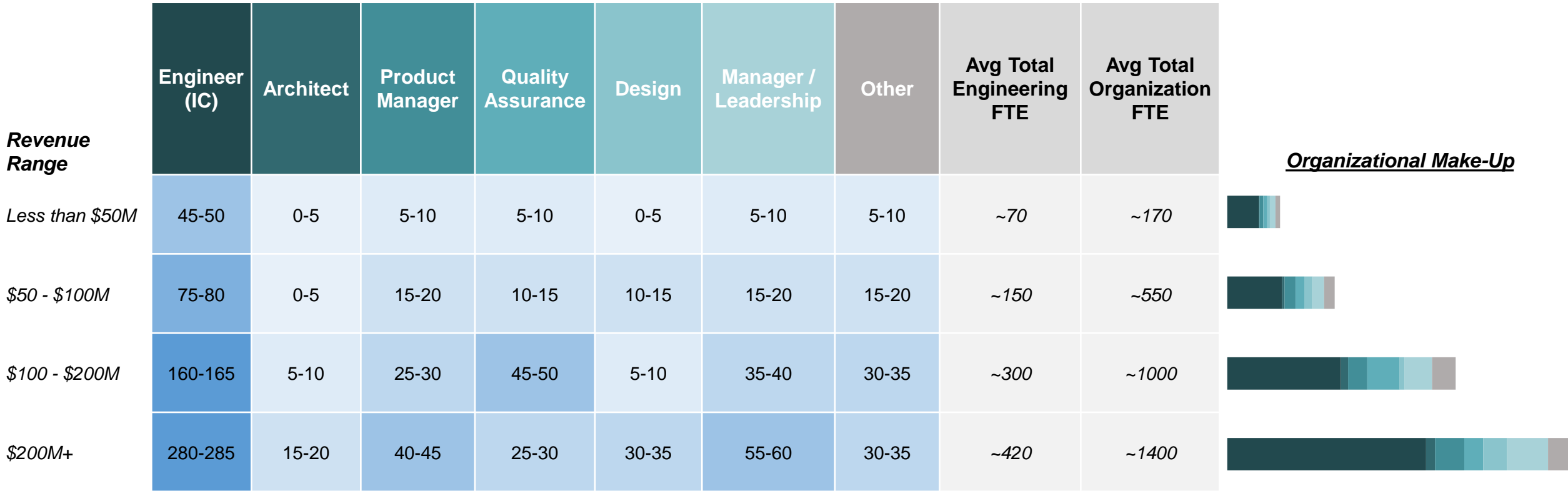
Engineering Teams: Headcount

Engineering headcount naturally increases as companies scale, with engineering IC and manager roles driving most of the headcount growth for organizations

Engineering Teams: Headcount

Select Respondents, n=20

What is your approximate technology / engineering organization headcount?



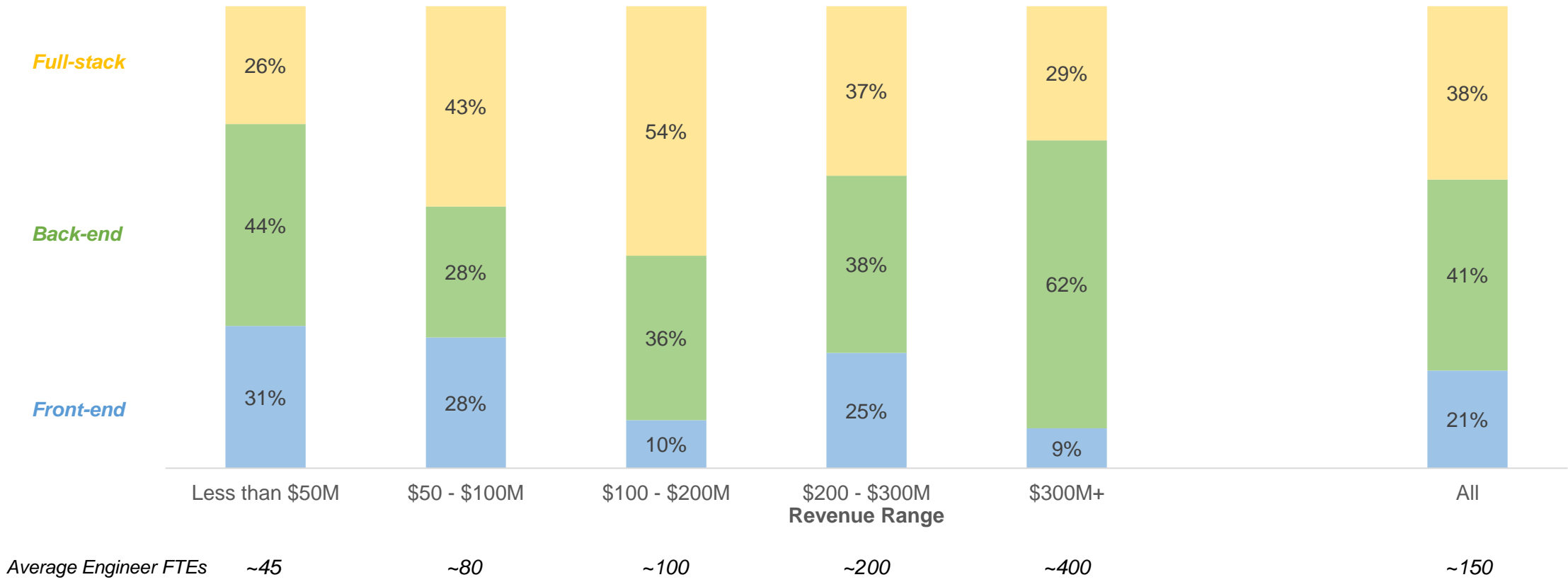
Engineering Teams: Split by Developer Expertise

Engineering team makeup tends to shift towards having more back-end and full-stack engineers as companies scale, perhaps due to the increased requirements around scalability and reliability as companies expand

Engineering Teams: % Split across Developer Expertise

Select Respondents, n=20

Approximately what % of engineers do you have in each category?



Organization Health: Employee Diversity

Software companies have historically struggled with engineering diversity; today, companies surveyed on average have 20% of their teams made up of women

Organization Health: Employee Diversity

Select Respondents, n=19

Approximately what % of your engineering team are women?

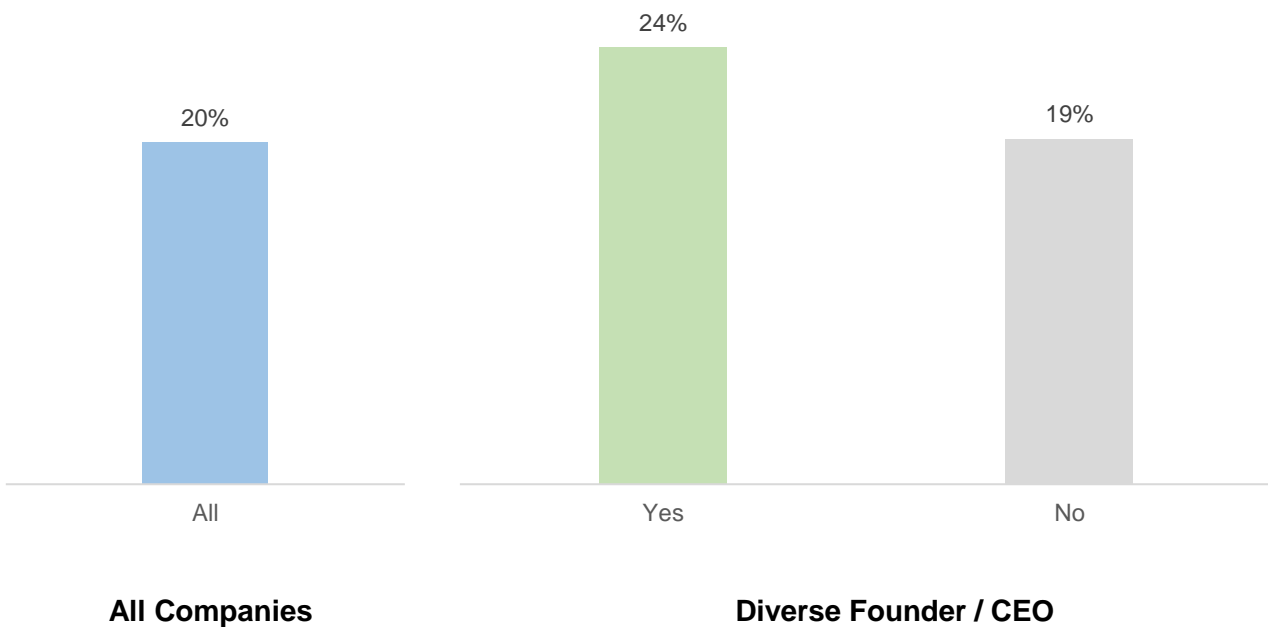
Across the participating companies in this study, teams reported somewhere between **10-50% diversity among their engineers**; however, this number includes Asian and South Asian engineers.

Based on industry averages from the [Bureau of Labor Statistics](#), we typically see **BIPOC engineers making up around 10-20% of the population.**

Diverse leadership attracts diverse talent; respondents with a diverse Founder / CEO were also found to have a **significantly greater percentage of BIPOC employees.**

There was not a significant impact on the % of women (but that is likely because most diverse Founder / CEOs are predominantly male). Executive team diversity did not have a notable impact on the % of women or BIPOC employees.

Average % Women in Engineering Team



Organization Health: Employee Tenure and Attrition

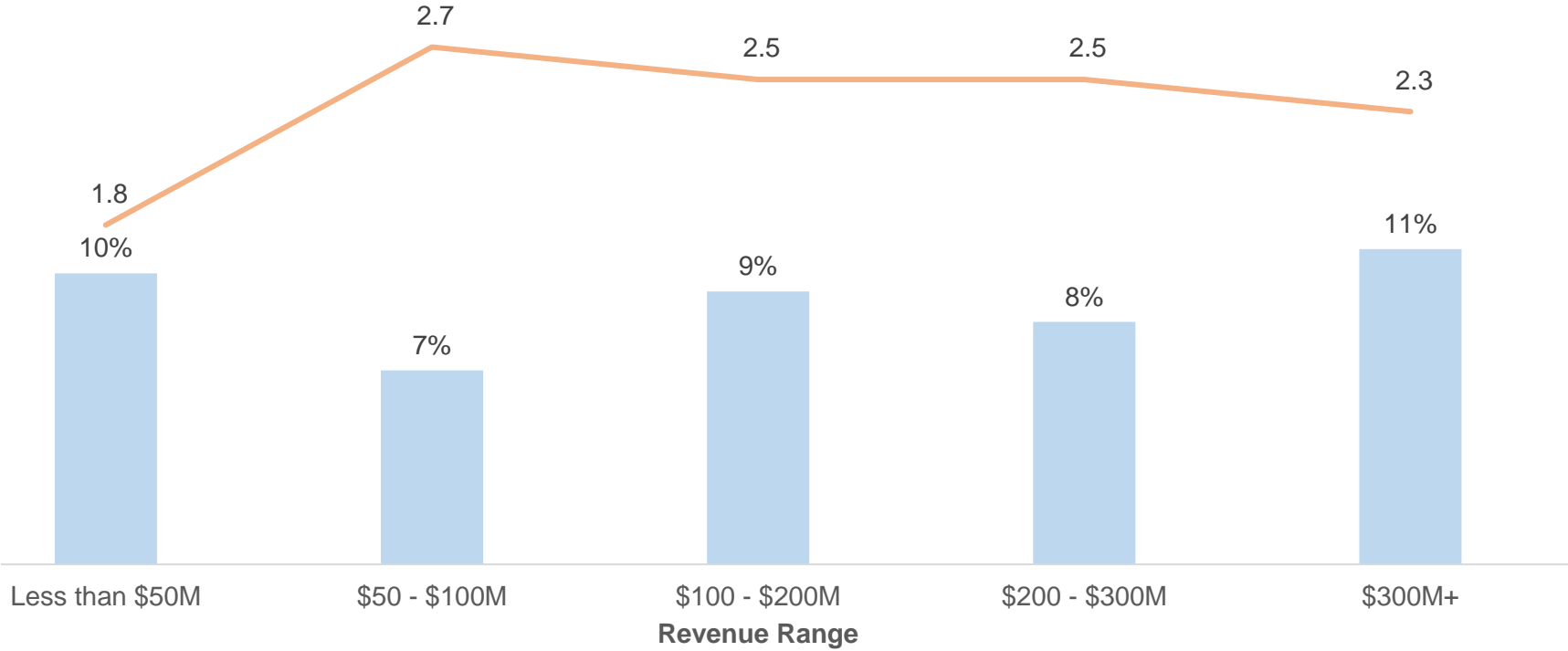
Average engineering employee tenure is around 2 years, with most companies seeing average annual attrition around 10%

Organization Health: Average Tenure and Attrition Rate

Select Respondents, n=19

What is your average engineering employee tenure and annual attrition rate?

■ Average Annual Attrition Rate %
— Average Tenure (# years)



Organization Health: Developer Job Satisfaction

Most companies start tracking developer job satisfaction after reaching \$50M in revenue through either custom employee surveys or Culture Amp surveys

Organization Health: Developer Job Satisfaction

Select Respondents, n=16

Do you track developer job satisfaction? If yes, what are the main metrics / questions you look at to track job satisfaction?



Types of Questions Asked

Open Response, grouped by category



The opinions expressed on this page solely represent the views of the respective speakers and are not necessarily the views of ICONIQ Growth or the participating companies shown on slide 3

Additional Engineering Resources

The Developer Technology Stack Study

A joint study with our Technical Advisory Board on the developer stack ecosystem and decision-making process, with a particular focus on the tools being used by companies at different stages of scale

Executive Summary – Tools Proliferation
 Given low experimentation costs, companies have started to include an increasing number of tools in their developer stacks; however, more mature companies tend to have consolidated stacks

Number of Tools Used by DevOps Team
 (Checkmark | Example Companies) (Include Business Tools)

Executive Summary – By Tool Type
 Decisions around tools selection are often driven by factors idiosyncratic to the tool category; sometimes these are driven by scale, by coding language or by codebase environment

Further detail by tool category on subsequent slides

DevOps Lifecycle: Key Themes & Findings

ICONIQ's Guide to Engineering Reporting

Our guide to engineering reporting best practices, including key frameworks, metrics, and the key topics engineering teams should be discussing in planning sessions or Board reporting

ICONIQ Technical Advisory Board April 2023

ICONIQ Growth's Engineering Reporting Guide

Why is this needed?
 R&D is increasingly becoming a bigger line item in OpEx and a key differentiator for companies. However, unlike Finance or OTM updates we have instead there is not a standardized approach to reporting on engineering updates - and how these tie to overall business outcomes.

How to use this guide:
 This guide can be used to frame engineering updates for various forums, such as engineering quarterly reviews, annual planning, or Board pre-reading. While the reporting structure and focus will obviously vary based on the stage each company is at, we believe if a company's R&D budget is over \$10M annually, the management team, Board of Directors, and engineering teams will all benefit significantly from consistent quarterly reporting on key engineering metrics.

While these metrics are intended to solicit discussion around key topics like engineering spend, headcount, and efficiency, we also believe that just having quarterly reporting will force engineering teams to be more introspective as they prepare these metrics each quarter.

Although engineering and product development are closely tied, this guide will be focused on engineering specific updates and challenges. Through more structured and consistent reporting, we hope this guide will facilitate thoughtful conversations to build a more productive and happy engineering organization (often your most expensive asset).

In the attached slides, we suggest teams break out engineering updates into 4 key focus areas:

- Key Engineering Metrics
- Engineering Allocation

Each meeting should start with a summary of the key engineering metrics and OKRs being tracked on a quarterly and annual basis. Starting with this focus means to think through what are the actual KPIs, focus the conversation around results instead of activities, and serve to level set the following conversation. Some of the key categories we recommend covering include R&D spend, people, engineering efficiency, and code quality, which will be addressed in greater detail in the following sections.

As an engineering organization grows, different types of questions and challenges start to emerge around the investment in time and people your organization is making and the return on those investments that come from the ever increasing engineering team.

It's critical to have a framework in place that allows the company to talk about and prioritize engineering investments in a way that makes sense for engineering internally - and also is understandable for the rest of the business stakeholders. This framework focuses the conversation on the levers and chooses the business truly has, by categorizing engineering allocation into 4 key buckets: New Capabilities, Quality Improvements, Internal Productivity, and Engineering Efficiency.

Engineering Metrics and OKRs

Key Metrics Actuals FY21 Targets

R&D Spend	% and \$ Spend on Tools & Technology	
People	% and \$ Spend on Headcount	
Efficiency	Engineering Headcount	
Code Quality	Attrition Rate	
	Lead Time for Changes	
	# of Updates / Releases	
	Developer Satisfaction	
	Cost of Poor Quality (COPQ)	
	Critical Defects	
	Service Uptime	

Placeholder for Annual Engineering OKRs

Engineering Allocation

	Last Quarter	Current Quarter	Next Quarter	Next 2-3 Quarters
New Capabilities				
Quality Improvements				
Internal Productivity				
Engineering Efficiency				

Engineer Allocations

ICONIQ GROWTH ANALYTICS



Christine Edmonds

Head of Analytics

cedmonds@iconiqcapital.com



Vivian Guo

Portfolio Analytics

vguo@iconiqcapital.com



Claire Davis

Portfolio Analytics

cdavis@iconiqcapital.com



Kelsey McGregor

Operations Analytics

kmcgregor@iconiqcapital.com



Leland Speth

Data Analytics

lspeth@iconiqcapital.com

You can also reach any of us at ICONIQGrowthAnalytics@iconiqcapital.com

ICONIQ GROWTH ANALYTICS

Seeking to empower our portfolio with proprietary analytics and insights across business operations and strategy



In-Depth Studies on High-Impact Topics

Comprehensive topical reports featuring proprietary insights and thought-leadership; leveraging rich portfolio and publicly available data to form an evolving, consolidated view of 'best-in-class' performance



Bespoke Analytics & Benchmarking

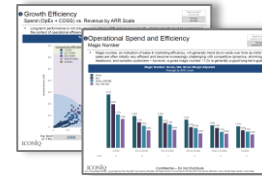
Ad-hoc analytics to address critical questions; benchmarking on key topics across companies varying in scale, growth and product type



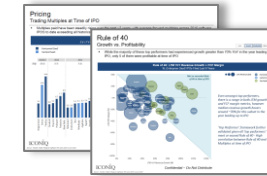
Advisory

Cohesive advisory anchored in objective data-driven work

Recent Studies



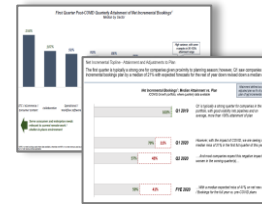
Topline Growth & Operational Efficiency



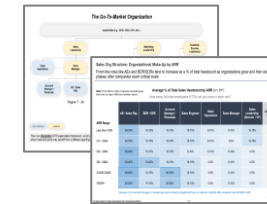
IPO Preparedness, Structure, Process



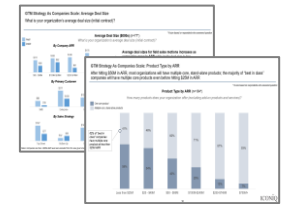
The Developer Technology Stack



COVID-19 Impact Series: Quarterly Attainment
Q1, Q2, Q3, Q4, 2021 Budgeting

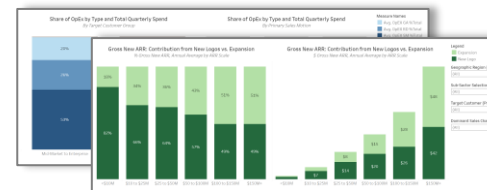


GTM Organization Structure

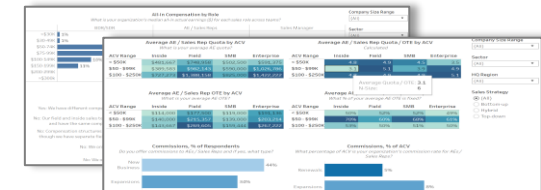


GTM Compensation & Incentives

Select Proprietary Companion Tools



Growth & Operational Efficiency Dashboard



GTM Compensation Benchmarking Dashboard

Currently only available to portfolio companies – reach out to ICONIQ Growth Analytics for access



TECHNICAL ADVISORY BOARD MEMBERS

PROVIDING DEEP TECHNICAL EXPERTISE TO PORTFOLIO AND PARTNERS



**Aditya
Agarwal**

*Former CTO
at Dropbox
(Cove,
Facebook)*



**Amy
Chang**

*Former EVP &
GM at Cisco
(Google,
Accompany, eBay)*



**Anantha
Kancherla**

*Head of AI
Infrastructure
at Facebook
(Lyft, Dropbox)*



**Jeff
Rothschild**

*Former VP
Infrastructure
at Facebook
(Mpath, Veritas)*



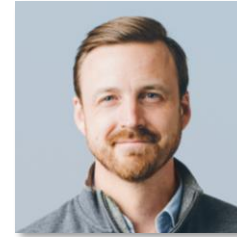
**Keith
Adams**

*Former Chief
Architect at Slack
(Facebook,
VMware)*



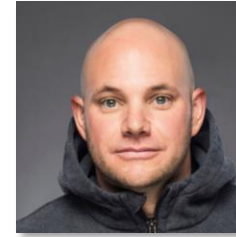
**Matt
Eccleston**

*Former VP
Growth
at Dropbox
(VMware)*



**Mike
Curtis**

*Former VP
Engineering
at Airbnb
(Facebook,
Yahoo!)*



**Nate
Walkingshaw**

*Former CXO
at Pluralsight
(Tanner Labs,
Stryker)*



**Neha
Narkhede**

*Cofounder &
Former CTO at
Confluent
(LinkedIn, Apache
Kafka)*

