

**Investment Memorandum**

**we360.ai**

LetsVenture Confidential

## EXECUTIVE SUMMARY

Company Name: We360 AI (Zenstack Private Limited)	Stage: Pre-Series A
Industry: Workforce Analytics   HR Tech   SaaS	Founding Year: 2021
Amount Raising: ₹18 Crore	Post-Money Valuation: ₹80 Cr (₹98 Cr pre-money valuation)
Proposed Investment: ₹1 Crore	Ownership Sought: ~1.02% (based on ₹1 Cr investment at ₹98 Cr post-money valuation)

**Key Recommendation:** Invest in a capital-efficient, AI-powered workforce analytics SaaS platform that is redefining how enterprises manage productivity, capacity, and engagement in hybrid and remote work environments.

**We360.ai** is positioning itself as the “**operating system for workforce intelligence**”, a full-stack analytics platform that helps enterprises monitor productivity, detect burnout, manage tech utilization, and optimize team performance through actionable insights and AI-driven recommendations. In a **\$2B global market**, projected to grow to **\$6B by 2032**, We360.ai is enabling companies to transition from legacy monitoring tools to intelligent, ROI-driven workforce management systems.

Founded by a first-time entrepreneur with deep enterprise exposure and backed by experienced co-founders in tech and sales, We360.ai launched commercially in **2021**. The company has scaled to **₹7.2 Cr ARR**, with **30,000+ paid users across 600+ customers, 96%+ retention**, and **95% gross margins**, all while maintaining a **cash-flow positive** operation. Average customer lifetime value is **₹6,000 per user**, with a **4:1 LTV:CAC ratio**, and enterprise accounts are expanding organically.

With early success in India, We360.ai is now entering the US market, where ARPU is **2.5x higher** than domestic markets. The founder is personally relocating to drive GTM in the US, supported by a proven inbound engine, MSP partnerships, and founder-led enterprise sales a model validated by leading Indian SaaS success stories.

The product is fully built in-house with integrations across major HRMS platforms (e.g., Keka, Zoho) and offers enterprise-ready AI modules like retention prediction, productivity copilots, and data loss prevention (DLP) features already in beta.

The **₹18 Cr Pre-Series A round is fully subscribed**, led by **GSF**, and other strategic investors, with proceeds earmarked for US expansion and AI product development.

This **₹1 Cr investment** provides entry into a fast-growing, high-margin SaaS business with clear global relevance, disciplined execution, and a differentiated position in an underserved enterprise segment.

## COMPANY OVERVIEW

**We360.ai** is building the infrastructure for workforce intelligence — an enterprise SaaS platform that helps organizations monitor productivity, optimize capacity, detect burnout, and make data-driven workforce decisions. In a **\$2B global market** where hybrid workforces are the norm but management tools remain fragmented, We360.ai replaces manual oversight, disjointed time-tracking tools, and subjective performance assessments with a unified, AI-powered platform. Most enterprises still rely on disparate systems for monitoring productivity, tracking engagement, and managing employee capacity resulting in inefficiencies, blind spots, and attrition risks. As workforce costs account for up to 80% of enterprise expenses, this legacy model breaks at scale. We360.ai is designed to solve this providing plug-and-play software that turns workforce data into actionable insights on productivity, engagement, and operational efficiency.

Since launching in **2021**, We360.ai has scaled to **30,000+ paid users across 600+ enterprise clients**, including leading IT/ITES, BFSI, and healthcare firms in India. With **96%+ retention**, **₹7.2 Cr ARR**, and **95% gross margins**, the company has shown strong product-market fit and disciplined, profitable growth achieved with zero external burn. With US ARPU trending at **2.5x Indian ARPU**, the company is now entering international markets with a founder-led GTM strategy. The CEO is relocating to the US to drive enterprise sales, supported by partnerships, inbound channels, and curated CXO roundtables.

- **Vision:** To become the global operating system for workforce intelligence.
- **Mission:** To empower enterprises with a single platform that optimizes workforce productivity, engagement, and cost-efficiency, powered by analytics, AI, and automation.

## FOUNDING TEAM

- **Arnav Gupta, Co-founder & CEO:** The force behind We360.ai's vision and growth, Arnav turned an internal workforce tool into a SaaS platform with **30,000+ users**. A University of Wollongong graduate, he leads product, GTM, and US expansion.

- **Swapnil Tripathi, Co-founder & Chief Revenue Officer:** With 20+ years in enterprise sales at **Tata, Reliance**, and startups — plus a successful exit from **QLS Academy** — Swapnil drives We360.ai's commercial growth and customer success.
- **Siddharth Gupta, Co-founder & Chief Architect:** An **MNIT Jaipur** alumnus, Siddharth has built enterprise-grade platforms at **MTX Group** and contributed to **Huma's exit**. He now leads We360.ai's tech and product architecture.



## PROBLEM STATEMENT

Workforce productivity is a boardroom priority yet remains one of the least standardized, under-optimized functions in enterprise operations. While CEOs and business heads push for efficiency, most organizations still manage distributed teams with a patchwork of manual trackers, basic monitoring tools, outdated HRMS systems, and subjective performance reviews. The result: low visibility, productivity leakages, and rising attrition risks.

### The Enterprise Reality

Marketing teams are expected to drive growth, not just run events — but their execution environment hasn't evolved:

- **No centralized system of record** for events: Teams use Google Forms for RSVP, WhatsApp for coordination, Zoom for hosting, and Excel for tracking. There's no single source of truth.
- **High-cost, low-leverage execution:** Agencies execute logistics, but marketers have limited visibility, no automation, and zero repeatability.
- **Zero integration with sales systems:** there is no structured CRM sync, conversion insight, or lead quality tracking — making follow-up a guessing game.
- **Events run like projects, not programs:** Every event is a one-off effort there's no templating, central ops layer, or way to scale with confidence.

Events may account for 15–30% of marketing budgets in enterprise GTM, yet the channel is still managed like a series of one-off projects rather than a scalable, repeatable motion.

## The Category Problem

The workforce analytics landscape is fragmented and outdated. Most existing tools fall into three categories:

- **Legacy HRMS & Attendance Systems (e.g., Keka):** Built for HR compliance, not productivity insights. These platforms manage payroll and attendance but lack analytics, capacity planning, or engagement tracking.
- **Time-Tracking & Monitoring Tools (e.g., Time Doctor, ActivTrak):** Focused on basic tracking or surveillance. Offer limited analytics, poor user experience, and no business intelligence integration.
- **DIY Internal Tools (Spreadsheets, Custom Dashboards):** Often cobbled together by teams, these lack automation, real-time insights, or scalability leading to fragmented workflows and decision-making bottlenecks.

None of these solutions treat workforce productivity as a strategic, data-driven function with proactive insights, AI-led recommendations, or direct business impact.

## Current Alternatives

Enterprises today rely on a fragmented mix of legacy systems, point solutions, and manual workarounds to manage workforce productivity. Each tool solves a narrow slice of the problem, but none offer the integrated intelligence, scalability, or AI-driven insights that modern enterprises require.

- **Legacy HRMS & Attendance Systems (e.g., Keka, Zoho People):** Designed for payroll, compliance, and attendance — not productivity. These systems offer little visibility into daily workflows, employee engagement, or capacity utilization.
  - Focused on administrative HR tasks, not operational efficiency
  - No real-time analytics or AI-led insights
  - Poor integration with business KPIs or productivity outcomes
- **Time-Tracking & Surveillance Tools (e.g., Time Doctor, ActivTrak, Teramind):** Built primarily for basic tracking or compliance monitoring, often with a surveillance mindset.

- These tools face pushback from employees and lack deep analytics or predictive intelligence.
  - Limited functionality beyond tracking and logging hours
  - Zero integration with project outcomes or business performance
  - Poor user experience and low adoption in enterprise settings
- **DIY Internal Stacks (Spreadsheets, Manual Reports, Basic Dashboards):** Common in mid-market and emerging enterprises, internal stacks combine manual reports, Excel trackers, and ad-hoc dashboards. While flexible, they are labor-intensive, error-prone, and impossible to scale.
  - High operational overhead
  - Disconnected data sources and siloed insights
  - No automation or AI capabilities
- **Point Analytics Tools (Standalone BI or Analytics Dashboards):** While business intelligence tools offer dashboards, they require manual data inputs and lack direct workforce monitoring or engagement metrics — making them reactive rather than proactive.
  - Data aggregation, not insight generation
  - Dependence on manual inputs
  - No role in day-to-day workforce management

## Why Now?

We360.ai operates at the intersection of three powerful shifts redefining workforce management:

**Remote & hybrid work culture is the New Reality for many industries**

	Remote & Hybrid Work Models	Increasing Focus on Employee Productivity	Adoption of AI and Automation in HR
<b>FACT</b>	<b>82%</b> of company leaders plan to offer flexible remote work options post- pandemic.	<b>20%</b> higher performance in companies prioritizing productivity management.	<b>\$3.86 B</b> is the projected size of the AI in HR market by 2026, up from \$2.13 billion in 2023.
<b>INSIGHT</b>	Remote and hybrid work demands stronger workforce management and productivity tracking to ensure accountability.	Businesses are recognizing the growing need for advanced analytics to optimize employee performance, driving demand for workforce analytics solutions.	AI and machine learning in workforce analytics drive demand for advanced time tracking and management tools.
	<a href="#">Gartner</a>	<a href="#">Mckinsey</a>	<a href="#">Marketsandmarkets</a>

## Hybrid Workforces | Workforce Cost Pressures | AI-Driven Management

- **The Rise of Hybrid and Distributed Workforces:** The shift to hybrid work has made traditional supervision and in-person management models obsolete. Enterprises now need always-on visibility into productivity, engagement, and capacity across locations, teams, and roles.
- **Workforce Cost Optimization is a Boardroom Priority:** With labor costs accounting for up to **80% of operating expenses**, CFOs are demanding granular visibility and actionable insights into workforce productivity and utilization making intelligent workforce analytics a mission-critical function.
- **From Passive Monitoring to Proactive Intelligence:** Enterprises are moving beyond surveillance and reporting. The need is for platforms that provide real-time insights, predictive analytics, and AI-driven recommendations that inform staffing, engagement, and performance decisions.
- **AI is Reshaping Workforce Management:** AI copilots, predictive insights, and intelligent analytics are set to redefine how enterprises optimize workforce efficiency. We360.ai is embedding AI at the heart of productivity management transforming data from static reports into dynamic, actionable intelligence.

## SOLUTION

### Product Description

**We360.ai** is a full-stack, AI-powered workforce productivity platform designed to make workforce management data-driven, proactive, and ROI-focused. It replaces fragmented tools, manual tracking, and surveillance-heavy systems with a single, integrated platform for monitoring, analyzing, and optimizing workforce productivity at scale.

The platform enables business leaders to measure engagement, detect burnout risks, manage capacity, and unlock AI-driven insights — all from a single dashboard. Unlike legacy HRMS systems or passive monitoring tools, We360.ai turns workforce data into actionable intelligence with predictive analytics and AI copilots built in.

### A Full-Stack OS for Event Execution

We360.ai brings every aspect of workforce analytics into one seamless platform:

- **Productivity Monitoring & Engagement Tracking:** Real-time analytics on app usage, screen time, focus hours, and engagement levels driving data-led decisions across teams and projects.

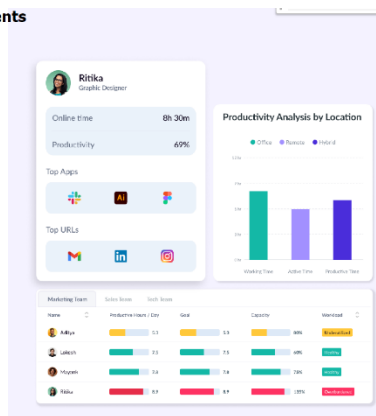


# Workforce Analytics & Intelligence with AI Agents

Increase workforce productivity.  
Improved performance outcomes.

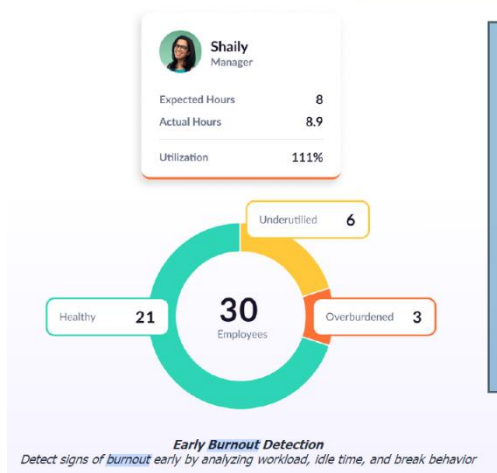
See what matters. Decide smarter—with cutting-edge monitoring,  
AI powered productivity insights, and strategic planning

- Drive productivity to new heights
- Detect burnout before it impacts performance
- Proactive engagement monitoring
- Analyze capacity and tech utilization effectively



- **Burnout Detection & Wellness Insights:** AI models track patterns like focus time, distraction rates, and behavioral shifts — proactively identifying attrition risks before they impact performance.
- **Capacity Planning & Tech Utilization:** Monitors software license usage, capacity load, and work patterns to optimize team structures and eliminate wastage.

## Productivity & Performance Management



- **AI-Powered Manager Copilot:** Personalized recommendations for managers on workload balancing, engagement interventions, and productivity boosts — based on real-time organizational data.
- **Seamless HRMS & GTM Integrations:** Native integrations with tools like Keka, Zoho, Teams, and Slack, ensuring a plug-and-play experience with minimal IT friction.



## AI-Powered Insights and Automation: Creating Agentic Managers across Our Modules

Module	Probable Use Case
HRMS	An admin is notified that Employee X has been skipping breaks consistently for three weeks, with declining productivity scores. AI recommends assigning lighter tasks or suggesting a meeting to address potential burnout.
Productivity	The system detects that Team A's productivity peaks between 10 AM - 1 PM. It suggests scheduling crucial brainstorming sessions during these hours, with proactive alerts if meetings are planned outside this optimal window.
Project & Task	AI identifies a delay in Task Y because Employee B is overburdened. It reallocates the task to Employee C, who has the bandwidth to meet the deadline, and notifies the manager for approval.

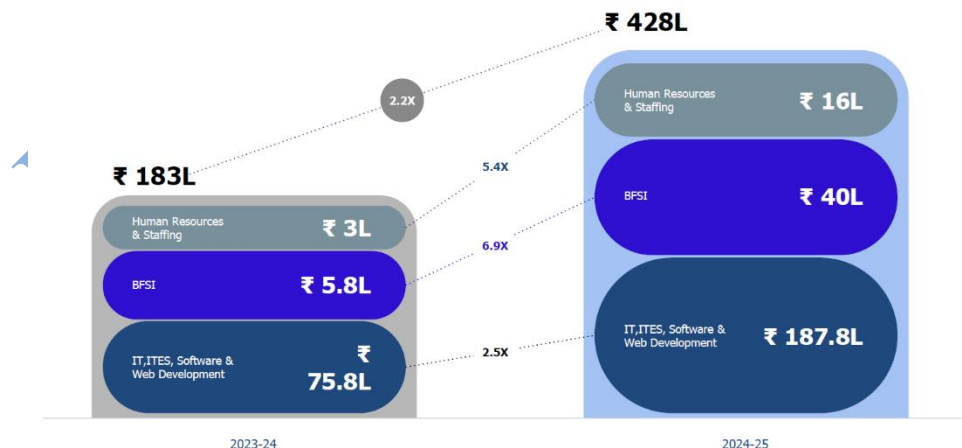
"We believe that Managers will not be replaced by AI but the Managers who do not use Ai will get replaced"

- **Security-First Architecture with Stealth Options:** Supports both standard and stealth modes of deployment, with enterprise-grade security protocols and data governance.

### Built for Scale and Speed

- **Modern SaaS Architecture:** Built on **Java Spring Boot, React, and Azure Cloud**, with seamless scalability and robust data infrastructure.
- **Rapid Deployment, Minimal Onboarding:** Plug-and-play installation with customers typically going live within **48 hours**.
- **Cross-Sector Applicability:** Adopted across IT/ITES, BFSI, healthcare, and staffing

### Our adoption in different industries



sectors — flexible for varied enterprise use cases.

## What We360.ai Replaces

Most enterprises currently juggle a complex stack of tools — HRMS systems for attendance, basic monitoring apps for surveillance, Excel sheets for tracking, and dashboards for reporting. We360.ai consolidates these into a single platform, eliminating silos, reducing friction, and delivering integrated insights that drive business outcomes.

## Competitive Landscape and Advantages

- **Purpose-Built for Enterprises, Beyond Monitoring:** We360.ai isn't a compliance or

	Funding	AI Enabled	Employee Monitoring	Project & Task	HRMS	Price/ User	24Hours Customer Support	DLP	Years in the Market	Revenue	G2 Ranking Ease of Use
we360.ai	\$1M in 2 Rounds	✓	✓	✓	✓	\$3.5 (Starter) \$5 (Pro)	✓	✓	3+	\$ 0.5M	1
ActivTrak	\$77.5M Last Round Series B	—	✓	—	✓	\$10 (Essentials) \$19 (Professional)	—	—	15+	\$ 110M	13
Hubstaff	Raised 1 round from West View Capital	—	✓	—	✓	\$5 (Starter) \$25 (Enterprise)	✓	—	12+	\$ 45M	2
Time Doctor	BootStrapped	—	✓	—	✓	\$5.90 (Basic) \$16.70 (Premium)	✓	—	12+	\$ 75M	17
PROHANCE	75% Stake Acquired by ChrysCapital	—	✓	—	✓	NA	—	—	13+	\$ 15M	NA
VISIER	\$220M in 5 Rounds	✓	✓	—	—	NA	—	—	15+	\$ 200M	NA

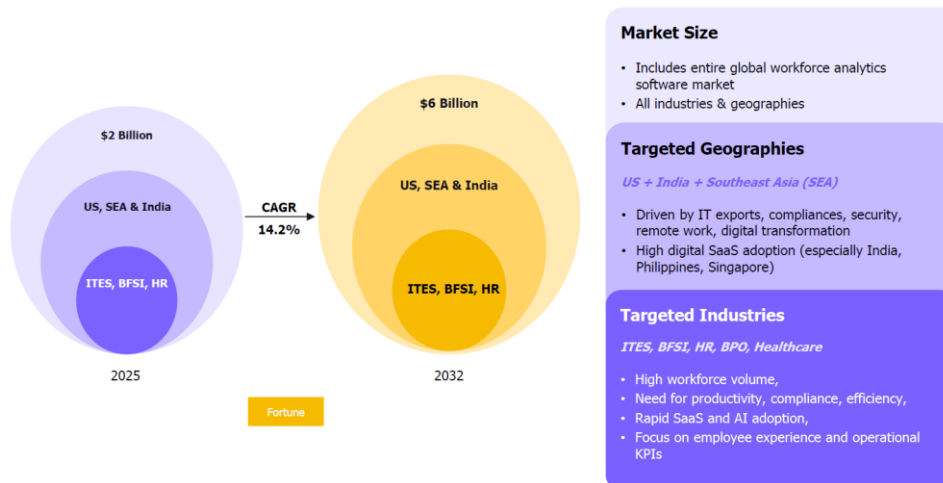
tracking tool it's an intelligence platform designed to improve workforce outcomes and optimize costs.

- **ROI-Focused Product Design:** Features like AI-led insights, burnout detection, and capacity optimization tie directly to business metrics, not just workforce reports.
- **AI-Native Platform, Already in Production:** The AI copilots, predictive insights, and risk scoring features are already deployed this is execution, not a roadmap slide.
- **High Margins, Strong Retention:** With 95% gross margins, 96%+ retention, and zero burn, We360.ai runs a capital-efficient, scalable SaaS model.
- **Founder-Led Global Expansion:** With the CEO moving to the US, We360.ai is entering higher-ARPU markets with a tested GTM playbook and enterprise-readiness.
- **Category Timing Advantage:** As enterprises shift from reactive monitoring to proactive intelligence, We360.ai is positioned as the platform of choice capturing a structural market shift happening now.

## MARKET OPPORTUNITY

**Workforce productivity is becoming a boardroom agenda and a massive, underpenetrated software opportunity.**

The global market for workforce analytics is expanding with a CAGR of 14.2%



As hybrid work models, cost pressures, and talent challenges converge, enterprises are prioritizing productivity intelligence over headcount growth. Yet most organizations still lack real-time visibility, proactive insights, or structured engagement tools to manage workforce performance at scale.

The global Workforce Analytics & Employee Monitoring market is valued at **\$2B today**, projected to reach **\$6B by 2032**, growing at a **14% CAGR**. This growth is driven by enterprise demand for productivity optimization, cost efficiency, and AI-led workforce management.

- **Legacy HRMS platforms** (e.g., Keka) — optimized for compliance, not productivity outcomes
- **Basic monitoring tools** (e.g., Time Doctor, ActivTrak) — built for tracking, lacking intelligence, scale, or business integration

We360.ai targets the growing base of **mid-market and enterprise companies with 100–5,000 employees**, particularly in IT/ITES, BFSI, healthcare, and staffing — sectors where productivity directly impacts margins.

With AI copilots, predictive insights, and enterprise-grade deployment, We360.ai is poised to capture meaningful market share as enterprises shift from reactive workforce tracking to proactive workforce intelligence.

## BUSINESS MODEL

## Model Narrative

Item	Details
Revenue Model	B2B SaaS – Subscription-based (monthly/annual), with optional enterprise deployment fees
Average Contract Value	₹5,000–₹20,000 per account/month (scaling with user volume and AI modules)
Revenue Growth	~70% YoY
Gross Margins	~95%
LTV	~₹6,000 per user
LTV : CAC Ratio	04:01
Refund Policy	7-day full refund policy on first-time purchases; pro-rata refunds for downtime >7 consecutive days
Geographic Revenue Split	~90% India (current), early US customer acquisition underway

We360.ai operates on a SaaS subscription model designed for how modern enterprises adopt workforce management tools. Revenue is primarily driven by monthly or annual per-user subscriptions, with pricing structured across multiple tiers **Starter, Pro, and Enterprise** based on user volume, feature access, AI module activation, and integration depth. The platform is built to scale with customer needs, enabling a **land-and-expand motion** where organizations start with focused deployments and grow adoption across teams and geographies.

## How Are We Making Money?

We360.ai operates on a SaaS subscription model aligned with how workforce analytics tools are adopted in enterprises. Revenue is primarily recurring, driven by per-user subscriptions, with pricing based on team size, AI module activation, and advanced feature access.

The pricing tiers cater to a range of customer profiles from mid-market IT services firms to large enterprises with flexible deployment options for cloud and on-premise needs.

Plan	Ideal For	Features
<b>Starter</b>	Small teams, monitoring needs	Core productivity analytics, engagement tracking
<b>Pro</b>	Mid-size enterprises	Advanced insights, burnout detection, AI recommendations
<b>Enterprise</b>	Large enterprises	Custom integrations, AI copilots, DLP features

	Freemium	Starter	Pro	Enterprise
Monthly	Basic monitoring tools for small teams	Essential features for growing businesses. ₹ 399 / user / month \$ 7 / user / month	Advanced analytics & productivity insights with AI ₹ 799 / user / month \$ 14 / user / month	Comprehensive solutions for large organizations ₹ 999 / user / month \$ 17 / user / month
Yearly		₹ 299 / user / month \$ 5 / user / month	₹ 699 / user / month \$ 12 / user / month	₹ 899 / user / month \$ 15 / user / month
	Free plan includes: →Upto 3 Seats →Dashboard →Activity Level →Data Retention (Upto 3 weeks) →Screenshot Capture Frequency (2 per hour)	Starter plan includes: →Scheduling & Attendance →Project & Task Management →Data Retention (Upto 6 Months) →Reports (Manual) →Admin Mobile App →Screenshot Capture Frequency (6 per hour)	Everything in Starter, plus: →AI-driven Predictive Insights →Workload Balance & Analysis →Productivity Goal Setting & Tracking →Reports (Automatic) →Website Utilization →Alerts →Field Tracking	Everything in Pro, plus: →AI based Recommendations →2 Year Data Retention →Active Directory Integration →Single Sign On →Team based Timezones →25+ Alerts →Screenshot Capture Frequency (60 per hour)

## Commercial Highlights

- **95%+ Gross Margins** with predictable, subscription-led recurring revenue
- **High Retention:** 96%+ with low churn and strong upsell opportunity
- **Land-and-Expand Strategy:** Accounts typically start with a 100-user deployment and expand over time
- **Strong Unit Economics:** CAC of ₹1,500/user with payback in ~2.5 months; LTV: CAC of 4:1
- **Sales Motion:** Direct founder-led enterprise sales, channel partnerships with MSPs, and inbound-driven lead gen

## Looking Ahead

Future monetization opportunities include premium AI modules, DLP add-ons, US enterprise accounts with higher ARPU, and deeper integrations with project management and security platforms — extending revenue per customer while maintaining high SaaS margins.

## TRACTION

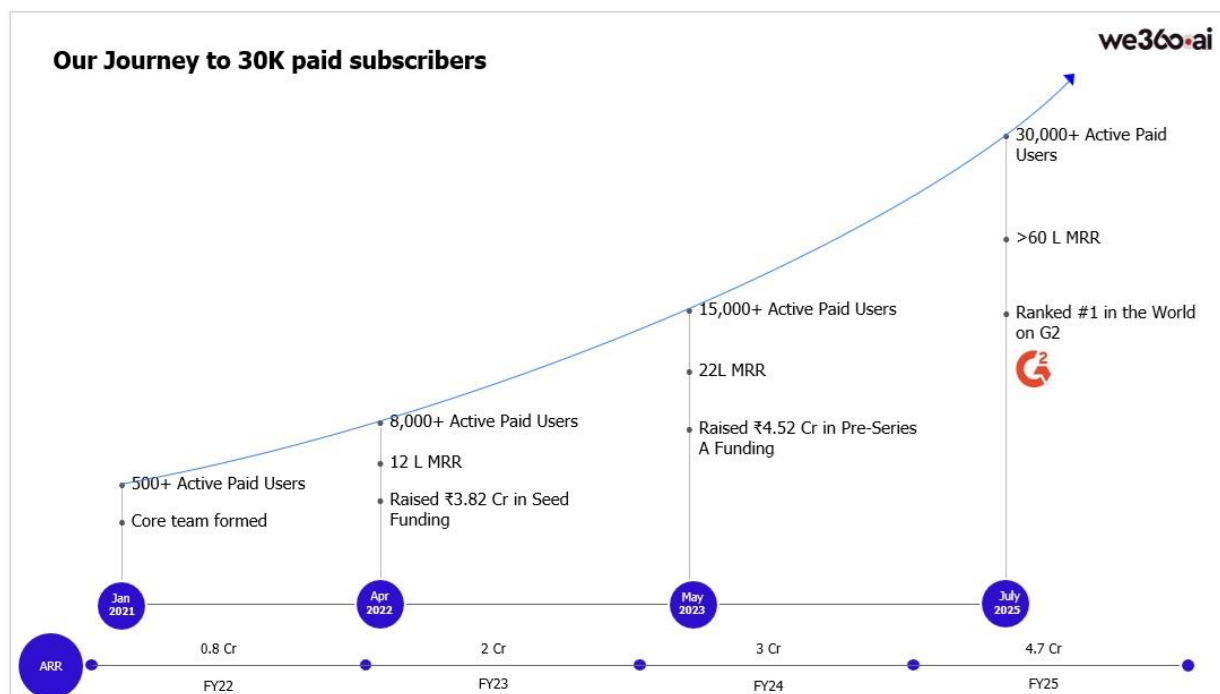
Since its launch in **2021**, We360.ai has shown steady, capital-efficient growth — scaling from an internal tool to a SaaS platform with over **30,000+ active paid users** and **₹7.2 Cr ARR** as of **July 2025**. The company has consistently grown ARR and customer base without external burn, validating both its product-market fit and execution discipline.

Key milestones in We360.ai's journey:

- **Jan 2021:** Launched with **500+ active paid users**; core team formation

- **Apr 2022:** Scaled to **8,000+ active paid users**; crossed **₹12 L MRR**; raised **₹3.82 Cr Seed Round**
- **May 2023:** Reached **15,000+ active paid users**; **₹22 L MRR**; raised **₹4.52 Cr Pre-Series A**
- **July 2025:** Surpassed **30,000+ active paid users**; hit **₹60 L MRR**; recognized as **#1 in the World on G2**

The company's sales pipeline continues to grow, supported by early traction in the **US market**, where average ARPU is **2.5x higher** setting the stage for its next phase of growth.



We360.ai maintains **95%+ gross margins**, a **96%+ retention rate**, and a healthy **4:1 LTV:CAC ratio**, scaling with minimal sales subsidies or discounts. With US ARPU at **2.5x India**, the company is poised for international growth, driven by a strong pipeline and founder-led GTM efforts.

## PRODUCT & TECHNOLOGY

### Product Overview

**We360.ai** is an enterprise-grade, AI-powered workforce analytics platform built to optimize productivity, engagement, and capacity across hybrid and distributed teams. Unlike legacy HRMS systems or basic monitoring tools, We360.ai is designed ground-up to deliver proactive insights,

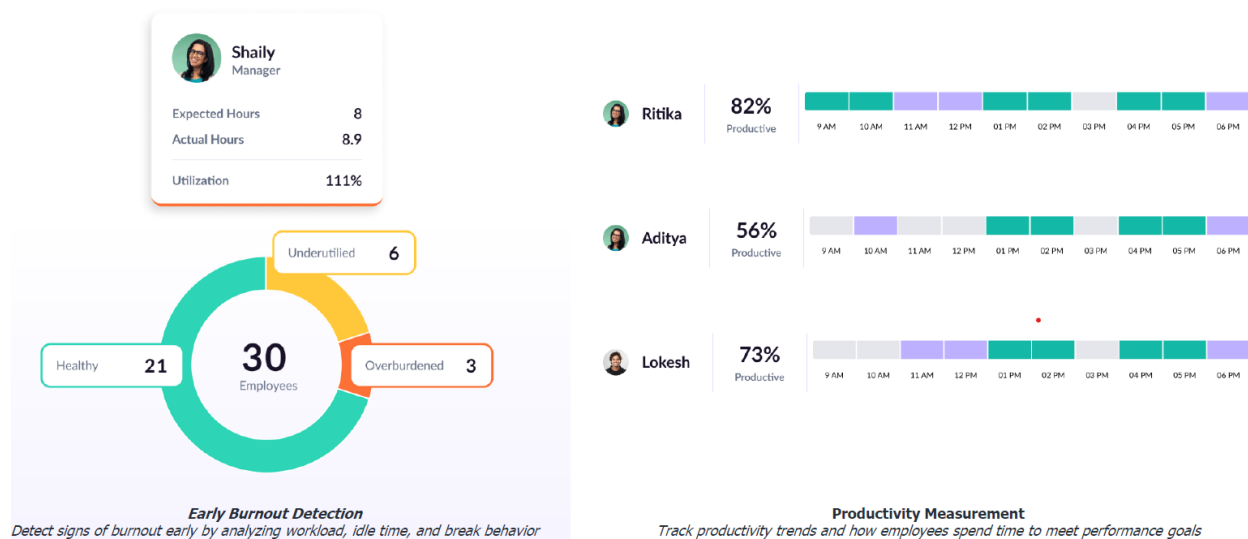
AI-led recommendations, and data-driven decision support — making workforce management a strategic function rather than a compliance task.

## Platform Modules

Each We360.ai module is integrated into a single platform, ensuring seamless data flow, real-time insights, and enterprise-wide visibility:

Module	Key Capabilities
<b>Productivity Analytics</b>	Real-time monitoring of app usage, focus time, active hours, and engagement levels
<b>Burnout Detection Engine</b>	AI-driven alerts on risk patterns, overwork indicators, and early attrition signals
<b>Capacity &amp; License Management</b>	Insights into software utilization, workforce allocation, and capacity planning
<b>AI Manager Copilot</b>	Personalized recommendations for managers on team optimization, engagement, and workload balancing

### Productivity & Performance Management



## Technology Stack

We360.ai is built on a scalable, cloud-native architecture with enterprise-grade security and modular design, allowing high-performance analytics and AI deployment at scale.



Layer	Technology Stack
Frontend	React.js (TypeScript)
Backend	Java (Spring Boot), Python (FastAPI)
Desktop Agent	C++ (Stealth & Standard Variants)
Browser Extension	JavaScript
Database	Clickhouse, PostgreSQL, Cassandra
Infrastructure	Azure Cloud Services, Apache Pulsar, Cloudflare CDN
Storage	Azure Blob, Cloudflare R2
Auth & Security	Keycloak OAuth 2.0, JWT
Monitoring & DevOps	GitHub Actions, Azure Log Monitor, Sentry, Kubernetes

## AI Roadmap (Live & In Development)

We360.ai is embedding AI across its platform moving from static dashboards to proactive, intelligent insights. The AI roadmap is a mix of live features and in-progress modules, all aimed at transforming workforce management from monitoring to intelligence.

Phase	AI Features
Live	Burnout risk alerts, capacity optimization suggestions, AI-powered manager copilots
In Progress	Predictive analytics on engagement, workload balancing algorithms, AI-led performance recommendations
Planned (2025)	Autonomous insights engine, AI-driven workforce allocation, predictive attrition analysis

## Enterprise Readiness & Strategic Design

We360.ai is built with enterprise needs in mind offering fast deployment, robust security, compliance with corporate IT policies, and a plug-and-play experience for scale-up operations.

Pillar	We360.ai Implementation
Security & Access	OAuth2.0, JWT, role-based access, audit logs
Deployment Speed	Self-serve setup with enterprise deployment support; typical go-live in 48 hours
Compliance	Data privacy aligned with IT security standards; customizable access controls
Full-Stack Ownership	Consolidates monitoring, analytics, AI insights into a single execution layer
Scalable Pricing Model	Competitive India-first cost base with global expansion flexibility

## Go-To-Market Strategy

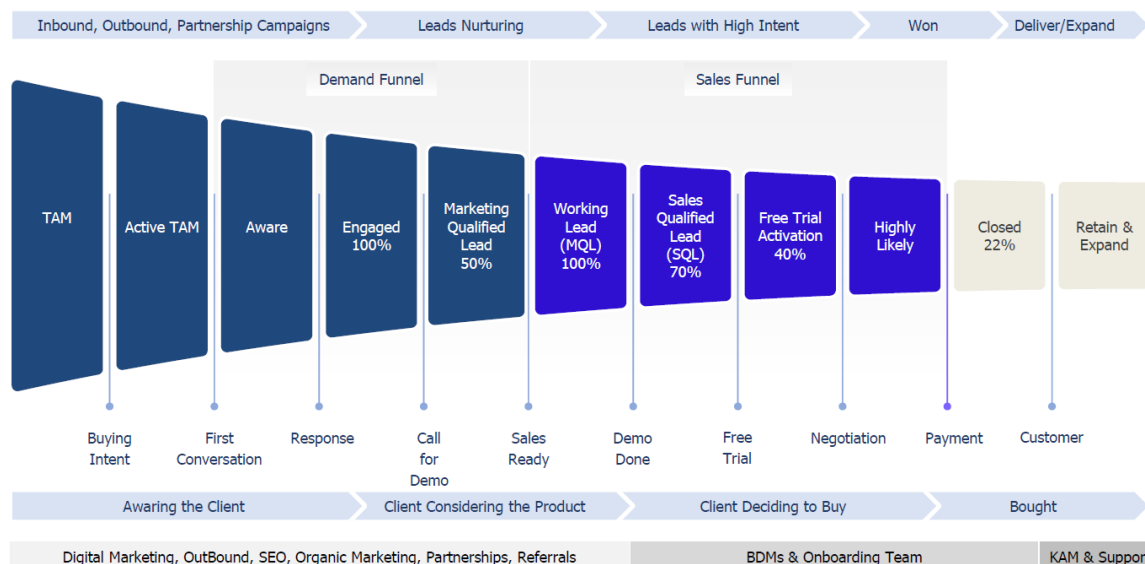
We360.ai's GTM motion is designed for capital-efficient, enterprise SaaS growth — combining high-retention inbound, founder-led enterprise sales, and strategic channel partnerships. With early traction in India and a growing presence in the US, We360.ai is scaling systematically into higher ARPU international markets.

### Ideal Customer Profile (ICP)

- **B2B enterprises with 100–5,000 employees**
- Operating in **IT/ITES, BFSI, Healthcare, and Staffing sectors**
- Managing distributed, hybrid, or remote workforces
- Seeking to optimize productivity, monitor engagement, and control workforce costs

### Acquisition Channels (Performance-Backed)

Channel	Lead Volume (%)	CAC Share (%)	LTV : CAC Ratio	Notes
Channel Partnerships	~30%	~45%	04:01	Leveraging MSPs and channel resellers
Founder-Led Sales & Outbound	~35%	~35%	05:01	Enterprise sales motion via CEO & leadership
Inbound & Content-Led Acquisition	~30%	~20%	06:01	Organic leads via SEO, G2, Capterra, LinkedIn
Events & Webinars	~5%	~5%	07:01	Used selectively for enterprise CXO engagement



### Go-To-Market Motion

- **Founder-Led Enterprise Sales:** US expansion driven directly by CEO with high-touch sales approach, early wins through direct outreach, referrals, and curated CXO engagements.
- **Channel Partnerships:** Leveraging MSPs and IT service resellers for mid-market entry and scaling within India and emerging markets.
- **Inbound-Led Growth:** Organic inbound through content, SEO, SaaS marketplaces (G2, Capterra) with a focus on thought leadership and comparison-driven discovery.
- **Events & Roundtables:** Targeted CXO roundtables, webinars, and partner-driven events used for credibility and account-based selling.

### Geographic Strategy & Monetisation Alignment

- **India & SEA:** Core acquisition markets via inbound + channel partnerships; efficient CAC with high retention
- **US & North America:** Founder-led GTM for high-ARPU enterprise accounts; early client wins validating demand
- **ARPU Strategy:** India ARPU at ₹300–₹500/user/month; US ARPU scaling at **2.5x India levels**
- **Expansion Model:** Land with monitoring & analytics, expand into AI modules, DLP features, and enterprise integrations

*We360.ai's disciplined GTM motion focuses on multi-channel acquisition, efficient CAC, and high-retention enterprise sales — with proven expansion potential in both Indian and global markets.*

### Deal Details

#### Round Construct

We360.ai is raising **₹18 Crore in a fully subscribed Pre-Series A round** at a **₹80 Crore pre-money valuation**. The round is led by **GSF**, alongside participation from strategic investors including SucSEED Indovation Fund, Real Time Angel Fund, Campus Fund, and other angels. The **LV Angel Fund** is proposing a **₹1 Crore investment**, at a **₹98 Crore post-money valuation**.

Proceeds from this round will be deployed towards:

- **US market expansion:** scaling founder-led GTM and sales operations

- **AI product development:** enhancing the manager copilot, predictive analytics, and DLP modules
- **Enterprise partnerships & integrations:** deepening ties with HRMS platforms, MSPs, and SaaS marketplace

## Risks & Challenges

Risk	Description	Mitigant
<b>US Market Entry Execution</b>	Market expansion into the US poses competitive and operational risks	Founder-led GTM with proven SaaS playbooks; early traction observed; focused, relationship-driven entry
<b>Category Perception (Monitoring vs Intelligence)</b>	Market perception risk of being a “monitoring tool” in a sensitive space	Clear positioning as a productivity intelligence platform; focus on AI-led insights, not surveillance
<b>Competitive Intensity</b>	Presence of global players like ActivTrak, Time Doctor, Teramind	Competitive pricing, AI-led feature set, India-cost advantage, and faster GTM cycles
<b>Scaling Enterprise Sales</b>	High-touch sales in the US market can be resource-intensive	Capital-efficient enterprise sales model with founder-led approach and channel partnerships
<b>AI Feature Adoption Risk</b>	Uncertainty on uptake of advanced AI modules in traditional enterprise segments	Phased rollout with customer pilots; AI modules integrated into core workflows to drive adoption

## Exit Potential

We360.ai operates in a fast-growing, high-margin SaaS category with multiple strategic exit pathways:

- **Strategic Acquisitions by Global Workforce & HR Tech Platforms:** Players like Keka and Zoho, ADP, UKG, and SAP SuccessFactors are actively expanding into workforce analytics, productivity insights, and AI-powered HR tools, positioning We360.ai as a natural acquisition target for product and market expansion.
- **Acquisitions by Security & Compliance SaaS Providers:** With We360.ai’s roadmap including **Data Loss Prevention (DLP)** and workforce security modules, security-focused platforms like **Teramind**, **ActivTrak**, and **Forcepoint** could view We360.ai as a complementary acquisition for workforce intelligence.
- **Regional Consolidators in India/SEA:** Large IT/ITES firms, managed service providers, or HR tech platforms in India and Southeast Asia may pursue acquisitions to embed We360.ai’s capabilities within their enterprise stack.
- **Financial Exits via Growth Rounds or PE Buyouts:** With strong unit economics (95%+ gross margin), low churn, and clear global relevance, We360.ai is positioned for scaling towards \$10M+ ARR, opening pathways for late-stage VC rounds, PE buyouts, or secondary sales.

## Business Maturity Signals

- ₹7.2 Cr ARR with projected ₹15 Cr ARR by FY26
- 70% YoY revenue growth with 96%+ retention and expanding enterprise accounts
- Average ACV of ₹5,000–₹20,000 per month per account, expanding with AI module adoption
- Enterprise deployments with 3,000+ user accounts (e.g., Celebal Technologies)
- Fully subscribed ₹18 Cr Pre-Series A round backed by leading investors (GSF, Dainik Bhaskar Family Office)

*These metrics highlight We360.ai's enterprise-grade maturity, sticky SaaS economics, and strategic fit for acquirers seeking AI-powered workforce analytics platforms.*

## Investment Thesis

We360.ai is building the execution layer for workforce productivity intelligence — a critical, yet underserved need as enterprises adapt to hybrid work, cost optimization pressures, and the demand for AI-driven business insights. Unlike legacy HRMS systems that focus on compliance or time-tracking tools built for monitoring, We360.ai enables enterprises to manage workforce productivity, engagement, and capacity as strategic levers for business outcomes.

Since its commercial launch in **2021**, We360.ai has demonstrated strong product-market fit, disciplined growth, and an efficient SaaS model — making it one of the most promising early-stage SaaS platforms in the workforce analytics category.

## Why Invest

- **Real Problem, Poorly Addressed by Incumbents:** Legacy platforms like Keka solve for HR operations, not productivity optimization. Monitoring tools like Time Doctor and ActivTrak offer limited analytics, no AI insights, and poor enterprise fit. We360.ai addresses a clear pain point: enterprises lack the tools to proactively manage workforce productivity, detect burnout, and optimize capacity at scale.
- **Full-Stack, AI-Native Workforce Intelligence Platform:** We360.ai integrates productivity analytics, burnout detection, AI manager copilots, and workforce optimization into a single platform — turning fragmented monitoring tools into proactive business intelligence systems. AI-powered insights and predictive analytics are already live, with advanced modules in rollout.

- **Proven Monetization with High Margin Profile:** We360.ai has scaled to ₹7.2 Cr ARR with 30,000+ paid users and 95%+ gross margins, maintaining a 96%+ retention rate and a 4:1 LTV:CAC ratio. Clients start with targeted deployments and expand into multi-module, multi-team usage validating the land-and-expand SaaS model.
- **Global Expansion with India-Cost Advantage:** The company has begun US market entry, where ARPU is 2.5x higher, while retaining India's cost advantage in operations and product delivery. This positions We360.ai for sustainable, high-margin international growth — following a proven SaaS export playbook.
- **Efficient Growth without Heavy Subsidies:** We360.ai has grown cash-flow positive, with no reliance on discounting or subsidy-led sales. All accounts are paying customers, with high retention and growing account value over time.
- **Founding Team with GTM Depth & Product Velocity:** Led by a founding team with deep experience in product, enterprise sales, and technology architecture, We360.ai ships with velocity, customer insight, and a clear focus on AI-driven innovation.

## Our View

We360.ai is redefining workforce productivity from a cost center compliance function to a strategic business lever operationalizing a shift that enterprises are only beginning to address.

The platform is live, proven across **600+ clients**, and directly solving a problem that legacy tools were never designed to handle: providing real-time insights, proactive intelligence, and business-aligned productivity optimization.

The business exhibits rare maturity for its stage:

- ₹7.2 Cr ARR with 70% YoY growth
- 95%+ gross margins and cash-flow positive operations
- 96%+ customer retention with multi-year enterprise accounts
- High LTV:CAC ratio and ARPU expansion potential
- US market entry with early traction and founder-led GTM

This is not a concept-stage SaaS play it is a live business with strong fundamentals, validated unit economics, and a product already in enterprise deployment. We believe We360.ai represents a timely, high-upside investment in a global SaaS category poised for transformation, with clear paths to both strategic acquisition and sustainable scale within the next 3–5 years.

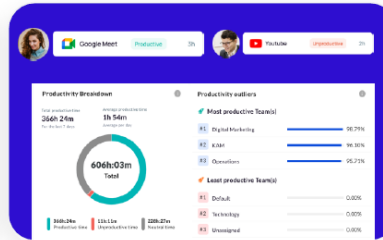
## Appendix

### Suite of work management tools

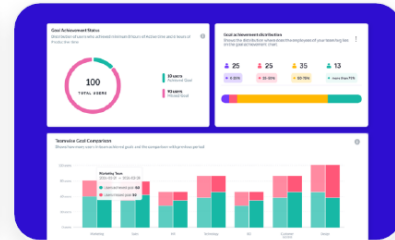
#### 01. Capacity Planning



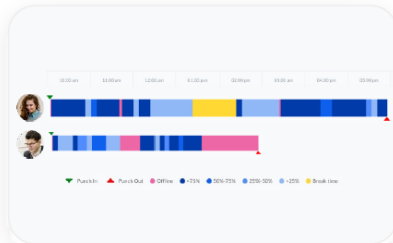
#### 02. Productivity Analysis



#### 03. Goals



#### 04. Timeline



#### 05. How we gauge productivity



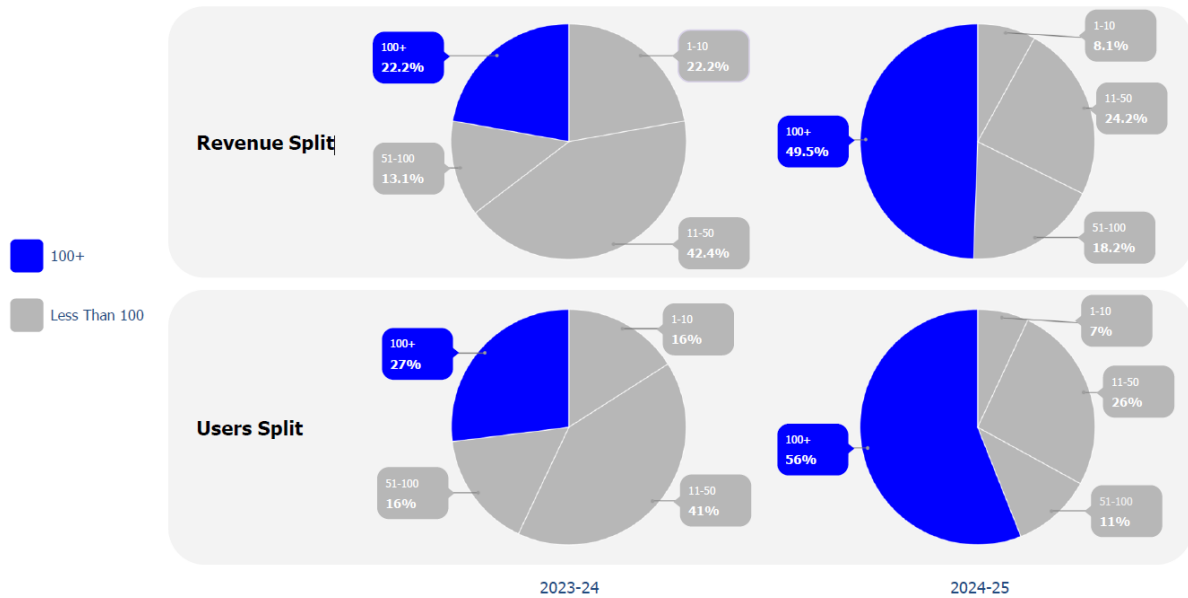
### Ideal Customer Profiles & Buyers Persona

Industry	Company Size	Key Decision Makers	Key Pain Points
ITES (Information Technology Enabled Services)	20-100+	CXOs	Lack of visibility into employee productivity
	100+	HR Head , IT Admin	Need to optimize workforce management
BFSI (Banking, Financial Services, and Insurance)	Insurance Companies	Founder's Office / Chief of Staff	Advanced reporting and analytics
			Reducing operational inefficiencies
BFSI (Banking, Financial Services, and Insurance)	Insurance Companies	Founder's Office / Chief of Staff	Productivity optimization
			Ensuring data security & privacy

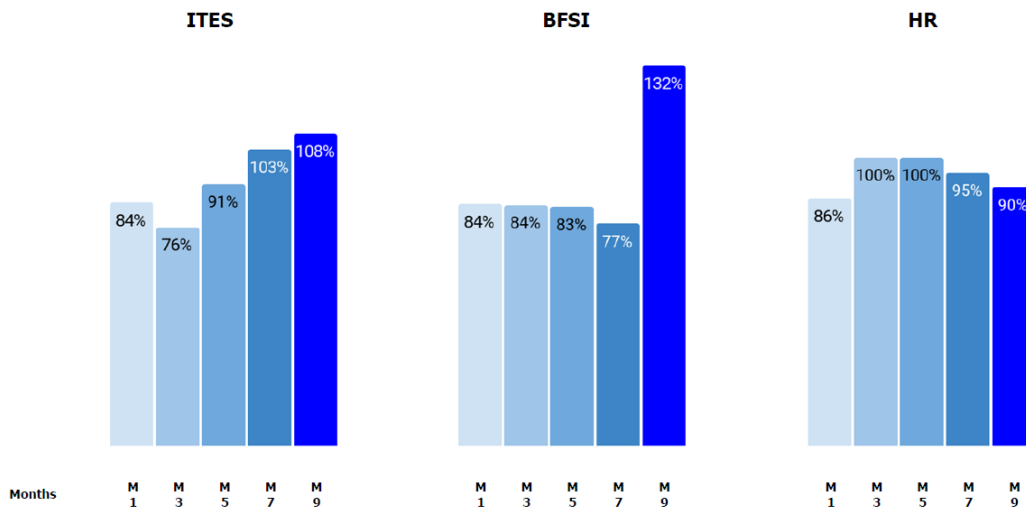




## Revenue & User Split



## Dollar Retention across ITES, BFSI & HR Sector



## Use cases of our existing clients

### Testimonials & Success Stories

Following are the few use cases across few of our active clients

Upraisal People	HR	The application tracking and productivity feature has helped the client to get more interviews scheduled per employee, without putting extra work burden on them.
Navitas Life Sciences	IT & Software	They have the policy to pay for the extra working hours. Using Stealth mode, they are tracking if the employees are really being active at additional work hours or not.
Black Piano Studio Technologies	Media & Telecommunication	Client is tracking the employee Idle time when they are rendering the videos and editing the videos.
MoneyFirst	BFSI	Using screenshot features to ensure the data security of their clients. Managing the employees by checking their activity
Vision 2k LLP	Others	Tracking Livestream of all the tele callers, with their last online time. If the employee Idle time is unusual than expected then consulting them towards more productivity.

"I've improved as a manager after adopting We360.ai into my organization. I am able to distribute workload based on my team's working health."

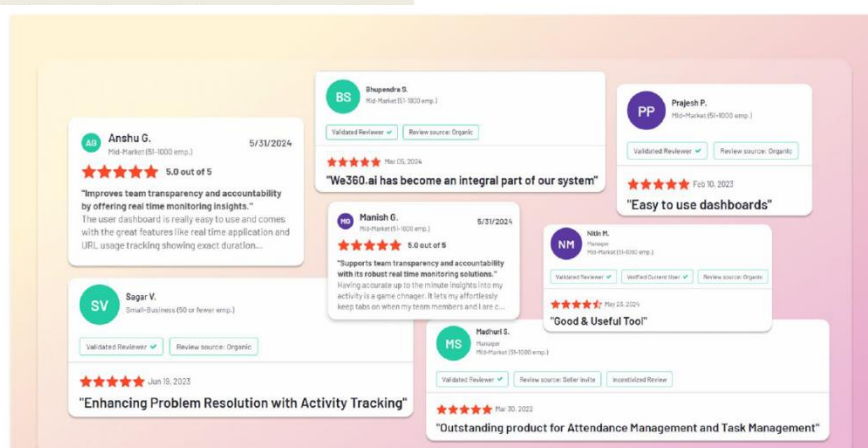
Sagar Patil, IT Manager  
Mind Technologies Pvt. Ltd.

"More than 100 members of my team work from remote places post-covid. Without We360.ai, keeping track of their time and attendance would be nearly impossible."

Arun Kumar, DGM  
Uber9 Business Process Services Pvt Ltd

"Our productivity has grown by at least 50% after deploying We360.ai. We recovered all costs within 2 months."

Sachin Jaiswal, HR & Admin  
JMV LPS Ltd



## Market Opportunity

	SMBs	Enterprises	Source
Global Number of Companies	20 M	0.1 M	World Bank & Statista
Total Global Workforce	3.3 B		ILO Global Workforce Data
Proportion of White-Collar Workers	60-70%		Bureau of Labor Statistics (BLS)
Total White-Collar Workers	2.1 B		Bureau of Labor Statistics (BLS)
Global Distribution of White-Collar Workers	45%	55%	ILO Employment Statistics
Global White-Collar Workers	1 B	1.2 B	ILO Employment Statistics
Willingness to Use Workforce Analytics Software	20%	40%	Gartner & Forrester on Workforce Analytics
Total Employees Available	193 M	590 M	Gartner & Forrester on Workforce Analytics
ARPU / Year	\$48	\$36	4/Month x 12 = 48 3/Month x 12 = 36
TAM in Billion	\$9 B	\$21 B	Total Employees Available x ARPU

## Market Recognition

**Best Customer Support**  
2023 & 2024

**Ranked 2nd Globally**  
Highest rated Category

**Ranked 1st Globally**  
Ease of Use Category

**Top Most Innovative Companies of India**  
2024