



# Corporate Strategy

## Service Overview

# Corporate Strategy Offering

I help investors and CEOs across Health & Wellness pick the right strategy for their vision, goals, and values.

I help my clients define their vision of success, understand the market landscape, develop conscientious strategic plans, and evaluate exciting opportunities.

# Client Success

## Snapshot of Prior Clients

### Investors



### PE-Backed Companies



PrecisionNutrition



### VC-Backed Companies



OSHI HEALTH®



## Snapshot of Client Outcomes

- ▶ Partnered with the CEO at a PE-backed healthy eating leader to identify and prioritize innovative go-to-market strategies, resulting in 4 new business model experiments
- ▶ Identified and prioritized portfolio expansion opportunities for the executive team at a VC-backed mental health leader, resulting in the strategic acquisition of a new business unit
- ▶ Partnered with internal innovation team at a public financial services leader to evaluate DNA & personal health data market trends and define related investment opportunities for their products and services

# What My Clients Say

"In short. Teddy is awesome. Working with individuals as talented as he has been rare both personally and professionally over the past 20 years. His particular collection of values and capabilities is truly uncommon in the financial world. I relied on Teddy as a sounding board, thought partner, and coach."



**Tim Jones**  
Chief Executive Officer  
Precision Nutrition

"Teddy does outstanding work - thoughtful, comprehensive, strategic, efficient - leveraging his industry expertise and consulting background. On top of that he is very responsive, proactive, and a pleasure to work with."



**Rob Klapper**  
Chief Executive Officer  
Empowered Education

"Teddy has proven to be an invaluable partner in thinking through growth prioritization. He is extremely organized, smart and resourceful. He is passionate about health and wellness and very special to partner with someone who really understands and supports your mission."



**Christine Barone**  
Chief Executive Officer  
True Food Kitchen

# Health & Wellness Focus

## Core Focus Areas – Proactive Human Health

Nutrition

Sleep

Exercise

Relationships

Mental Health

Preventive Care

## Out of Focus

- Traditional Healthcare
- Beauty
- Life Sciences
- Real Estate
- Professional Sports
- Sexual Health
- Substance Use Disorders
- Financial Wellness
- Life Coaching
- Animal Health

Note: Types of companies within these core focus areas includes services, products, technology, content, and marketplaces.

# How We Can Work Together

	Growth Strategy	Other Corporate Strategy
Description	In-depth evaluation of Health & Wellness sectors to craft an initial strategy and identify actionable paths forward	In-depth evaluation of a Company's current and potential markets, products, customers, and/or competitors
Who It Is For	Companies exploring novel growth opportunities across Health & Wellness	Companies seeking analysis & insights to guide strategic decision-making
Key Deliverables	<ul style="list-style-type: none"><li>• Sector Evaluations</li><li>• Entry Options</li><li>• Recommendations &amp; Roadmap</li></ul>	<ul style="list-style-type: none"><li>• Tailored Analysis &amp; Insights</li><li>• Strategic Opportunities</li><li>• Recommendations &amp; Roadmap</li></ul>
Timing	~1-2 Months	~2-4 Weeks

# Why Partner With Me

## My Key Differentiation

- Human Connection & Empathy
- Unique Cocktail of Top-Tier Expertise
- Expansive Health & Wellness Network
- Proprietary Health & Wellness Data
- Superb Data Sufficiency
- Personal Use and Passion



## Your Improved Outcomes

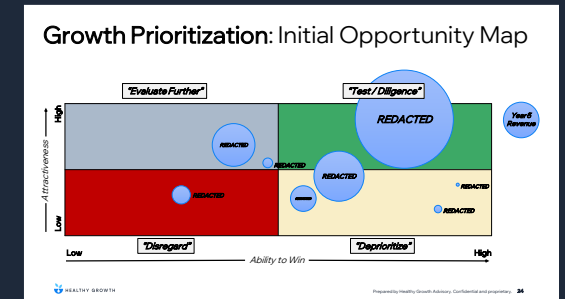
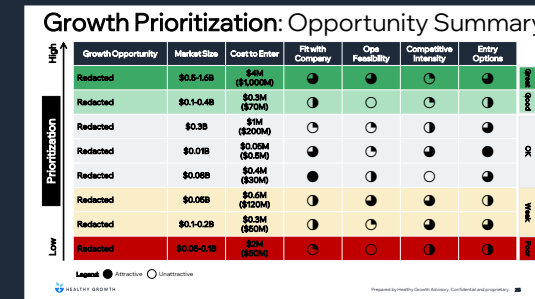
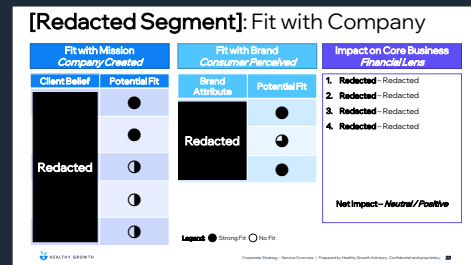
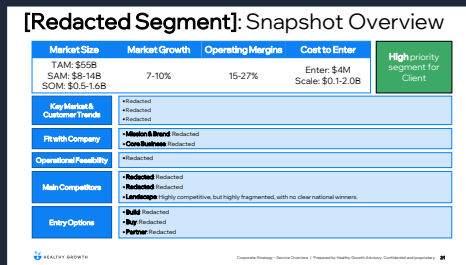
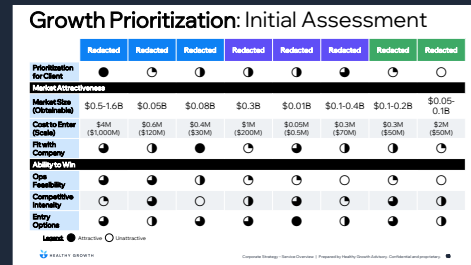
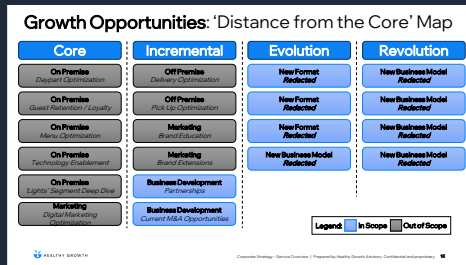
- Ensure a Clear Vision of Success Based on Your Goals and Values
- Epistemological Alignment for Your Key Decision-Making
- Rigor, Quality, and Speed of Execution
- Novel Health & Wellness Growth Opportunities
- Pre-Screening of Growth Opportunities for Attractiveness and Ability to Win

# Situation

The CEO at a PE-backed middle market leader in healthy eating wanted to update her growth and distribution strategy to best match the evolving needs of her customers and the broader market. She wanted to answer the question *“How do we grow in the right way?”*, share our initial answers with the board, and then invest in the most exciting opportunities. We evaluated 8 ‘evolutionary’ and ‘revolutionary’ growth opportunities, representing ~\$2B of incremental revenue, to better understand their attractiveness, as well the ability to enter and win. This evaluation resulted in a clear prioritization of and experimentation with 4 specific growth opportunities.

# Outcomes

- 8 growth opportunities identified and evaluated
- 4 growth opportunities selected for investment



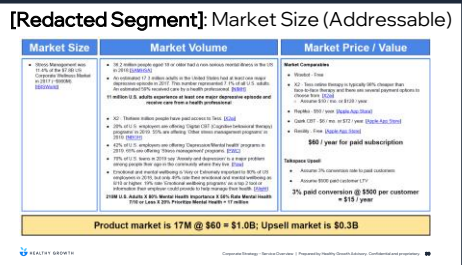
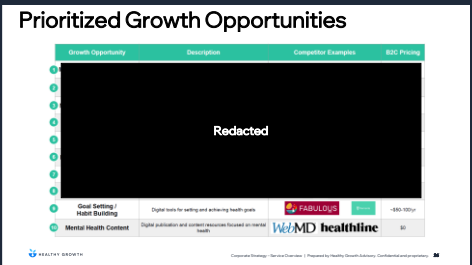
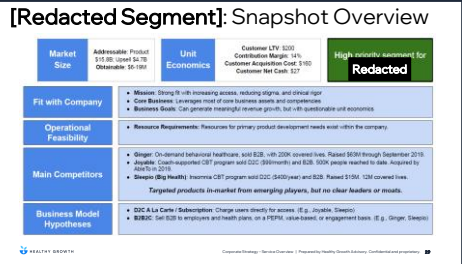
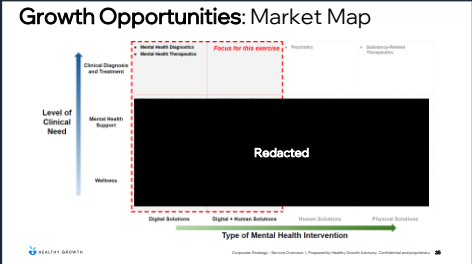


# Case Study: VC-Backed Company Growth Strategy

## Situation

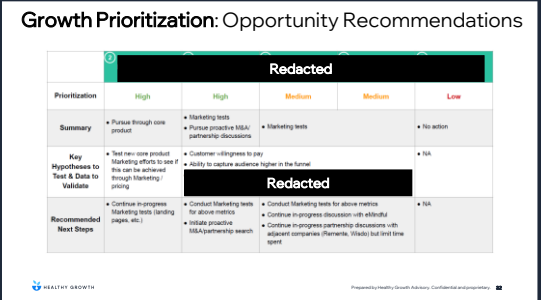
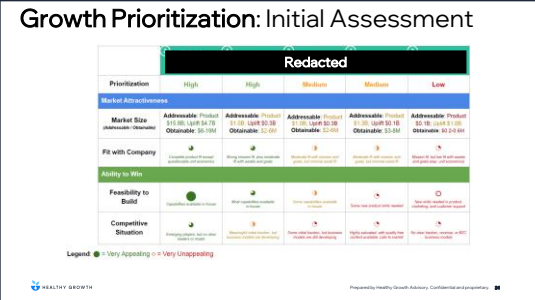
The leadership team at a VC-backed leader in mental health wanted to update its product growth strategy to best match the evolving needs of its customers and the broader market, while also creating a clear framework for making related strategic decisions as a leadership team. They wanted to answer the question “*What else should we build/buy to grow and expand our current offering and realize our vision?*” and then proactively invest into the most exciting opportunity. We identified 13 adjacent growth opportunities, and then prioritized and evaluated 10, to better understand their attractiveness, as well the ability to enter and win. This evaluation led to the selection of a specific growth opportunity, resulting in the strategic acquisition of a new business unit.

## Project Samples



## Outcomes

- 13 growth opportunities identified
- 10 growth opportunities evaluated
- 1 strategic acquisition of a new business unit

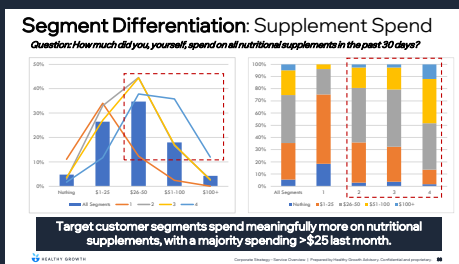
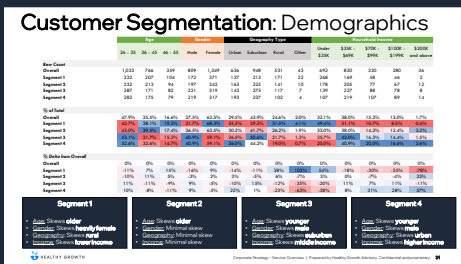


# Case Study: VC-Backed Company Customer Segmentation

## Situation

The leadership team at a VC-backed emerging leader in sports nutrition wanted to update its customer segmentation archetypes. They wanted to validate initial archetype hypotheses from their branding agency with objective data. We created an online customer segmentation survey (N=3.3K) and utilized advanced clustering analysis to identify 4 customer segments that mapped roughly to the 4 archetype hypotheses in their attitudes and behaviors. The survey revealed that each customer segment had specific demographic skews and meaningful differentiation in a variety of behaviors and attitudes, enabling differentiated marketing efforts to reach targeted customer segments.

## Project Samples

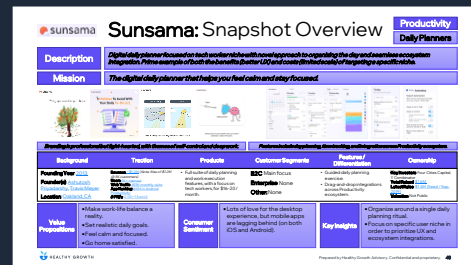
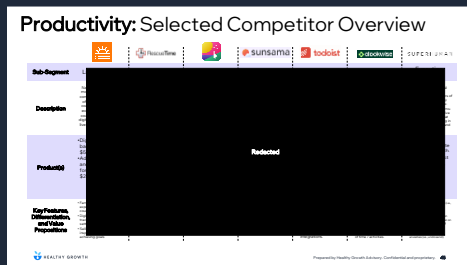
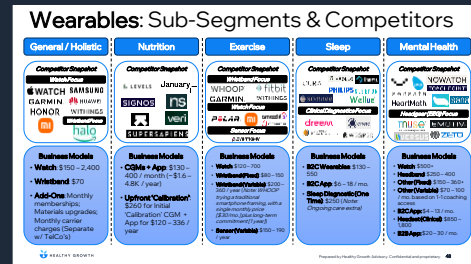
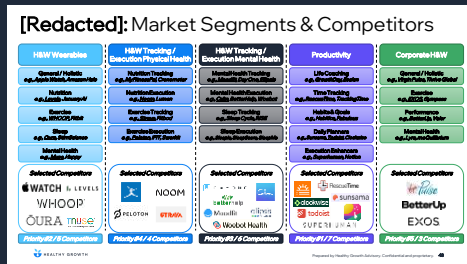


# Case Study: Venture Creation Studio Product Strategy

## Situation

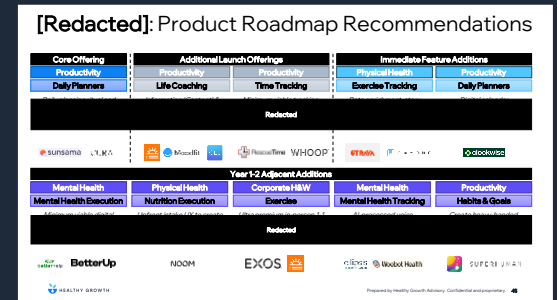
A venture creation studio had a vision for creating a lifestyle behavior optimization tool, but did not yet have a product strategy. I evaluated 5 major market segments, including 22 sub-sectors and 25 key companies, to validate key hypotheses; shape the value propositions, product features, business model, and go-to-market strategy; and enable partnership conversations and opportunistic M&A. As a result of our initial phase of work, I identified 20 actionable product strategy recommendations and created a 3-year product roadmap to provide an entry point into lifestyle behavior optimization.

## Project Samples



## Outcomes

- 22 sectors and 25 key companies evaluated
- 20 product strategy recommendations
- 3-year product roadmap



# About Me

## Teddy Daiell

Founder and Managing Partner



Connect



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Leveraging a unique combination of 13 years of expertise from top-tier private equity, strategy consulting, and Health & Wellness, Teddy has provided corporate development and strategy consulting to over 60 investors and companies across Health & Wellness, including nutrition, exercise, mental health, sleep, and more.



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