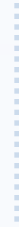

SwiftScale



Value Proposition

M&A Market Facts

- **Global M&A Deal Levels Are Strong**
 - Average of 30,000 completed deals 1 year trailing in 2012
 - Approximately 11,000 deals involving US-based companies in 2012
 - Reflects market peaks of 1998/1999 and 2005/2006
 - Driven by excess cash and need for external growth
- **2013 Expected to See Increased Deal Activity**
 - Challenges and turbulence expected
 - Internal balance sheets are strong, internal growth difficult
 - Both capacity to transaction and appetite for deals have increased over the same period

The State of Deal Management

- Harnessing information is difficult and time-consuming
 - Time delays
 - Lag in decision making
- Understanding the “state” of the data is often difficult due its dynamic nature
 - You don’t know what you don’t know
- Can create unquantified risk in the decision making process
 - May lead to poor decision-making overall, or
 - May drive decisions in a way that is out of alignment with strategic intent of a deal
- Drives additional cost in assessment (longer to determine viability of a deal) and actual deal closure

The Current Landscape for Solutions

- Most deals leverage manual tools (eg, spreadsheets, word docs) to collect due diligence information
- Source data is often difficult to assess due to lack of completeness
- Leads to inability to accurately assess risk for proper decision making

Introducing SwiftScale

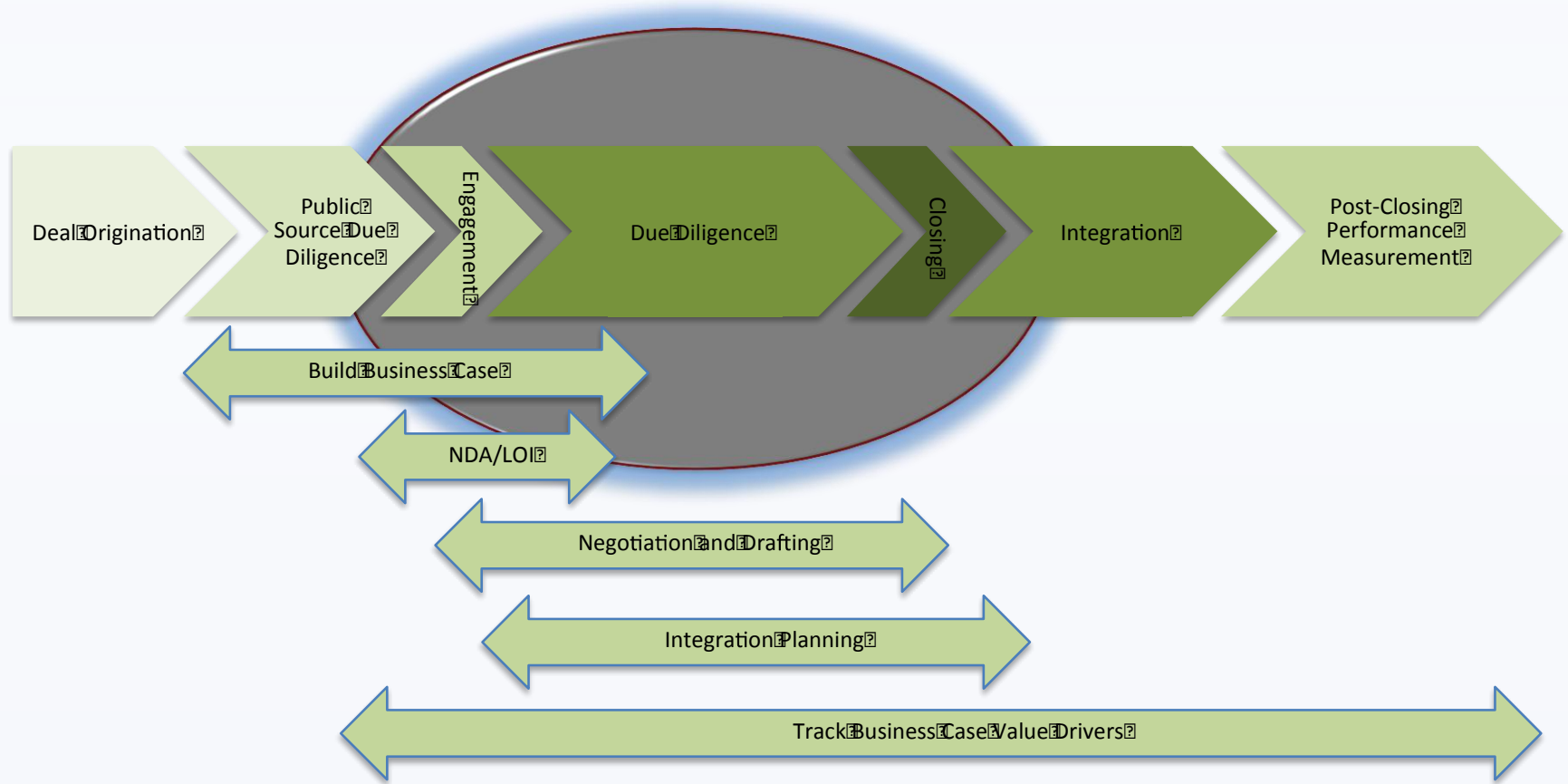
- Offers a concise and consolidated solution for corporate transaction management
- Provides views for decision making through Opportunity and Risk Profiles
 - Offers configurability to shape views based on Strategic Intent and focus areas of Opportunity and Risk
 - Flexible enough to see top view and “hot spots”
 - Drill down into detail for mitigation and decision making
- Presents a secure, flexible platform for efficient due diligence management
- Future: Develop intelligence to provide deal comparative analysis by industry and by like profile

Intended Audience

- Targeted users
 - Deal Manager
 - Overall responsibility for ensuring progress on deal execution
 - VP, Corporate Development, CFO
 - Coordinator
 - Responsible for coordination of deal activities to ensure flow (eg, due diligence, integration planning)
 - Subject Matter Experts

- Benefits
 - Provides ability to tailor tasks and manage a deal based on specific needs
 - Enables more efficient management and decision-making by making real issues the focus
 - Offers the ability to assess risk and opportunities in deals more effectively

SwiftScale Focus Area



SwiftScale

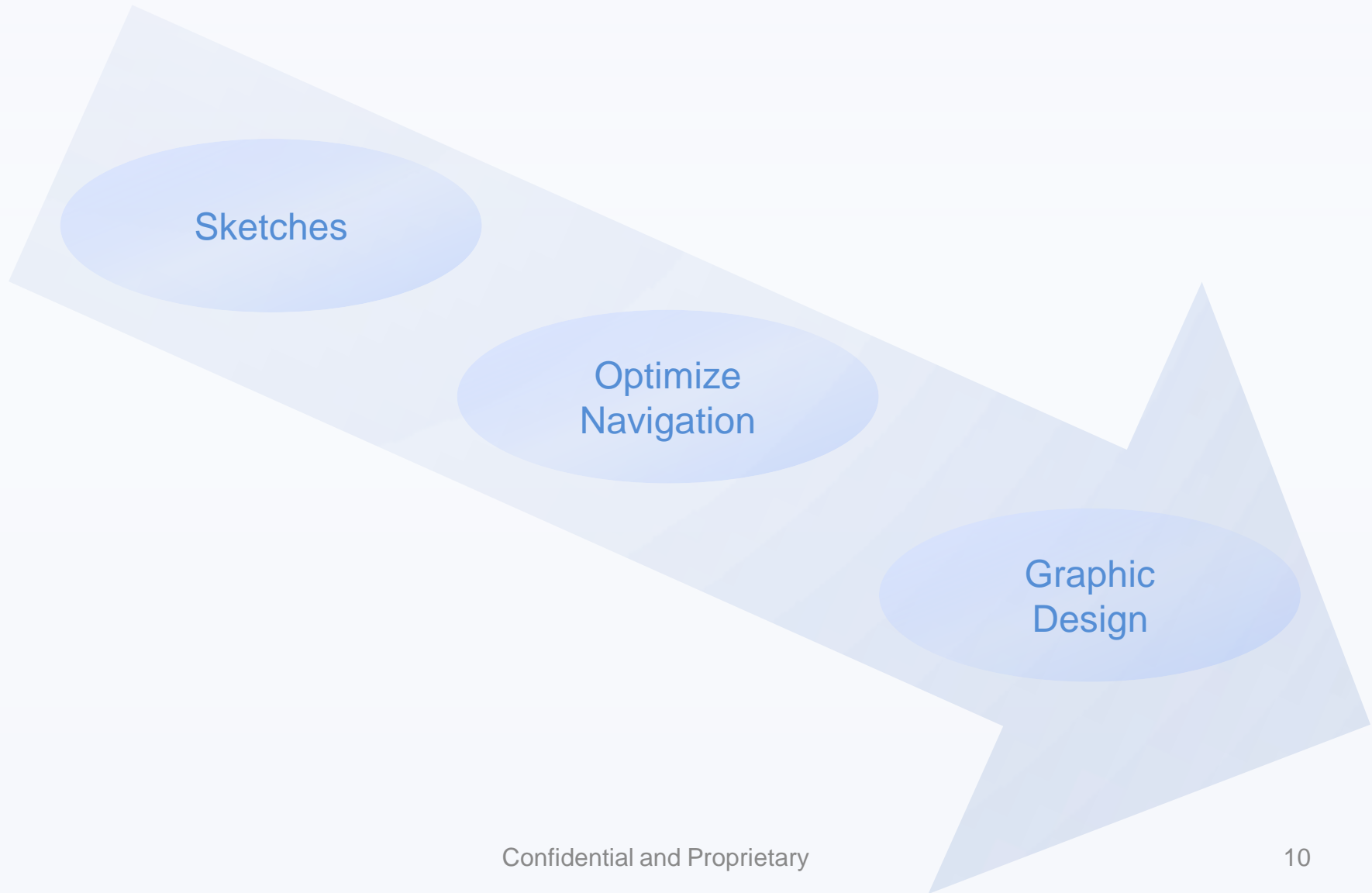


Functionality

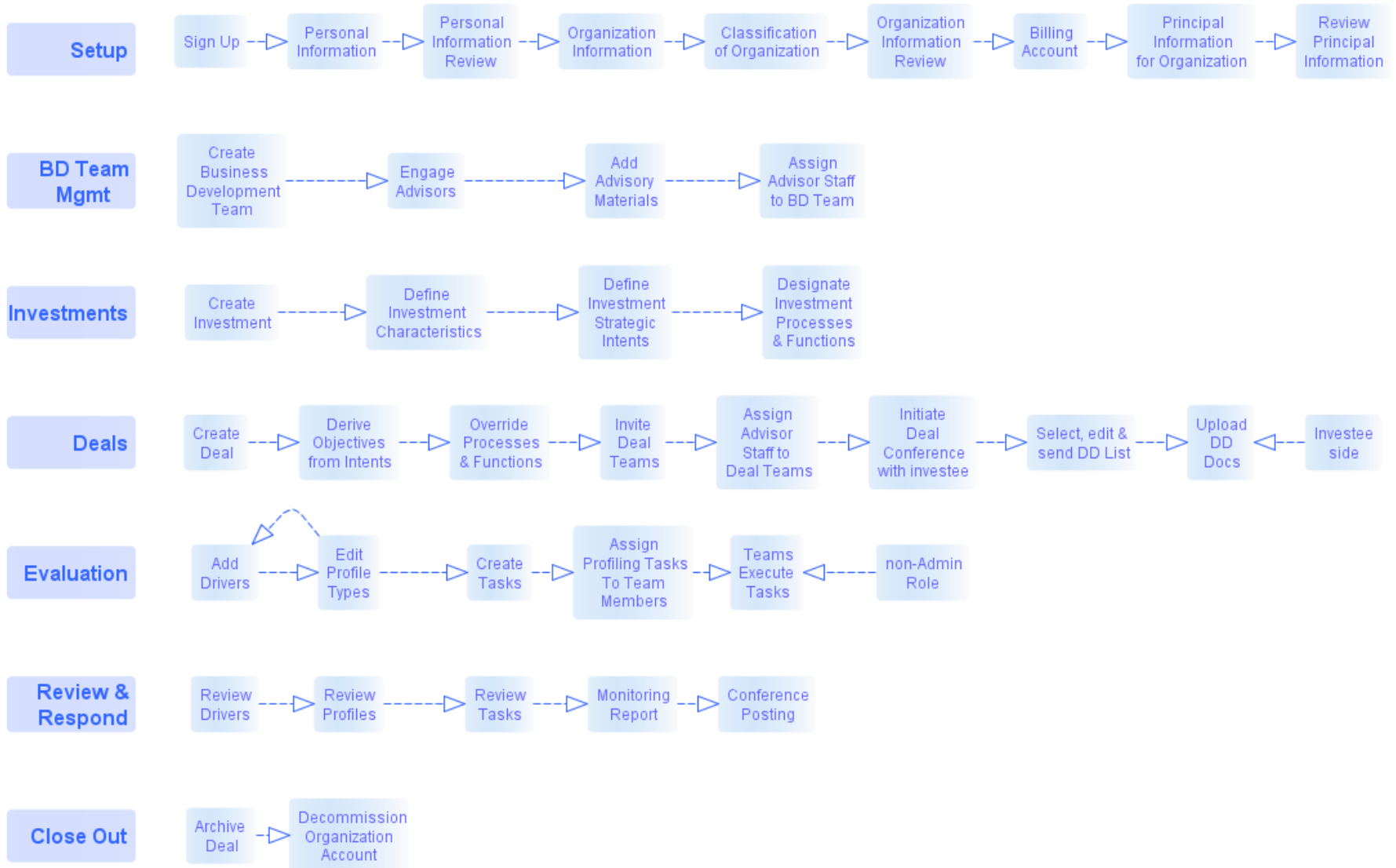
Design Assets

- Product Requirement Document
- Functional Design UX Sketches
 - Outline UX Process
 - Deferred Functionality
- Web Service API Documentation
 - Outline API Process
- Technology Approach
 - Proposed Technology BoM
 - Deployment Architecture Document

UX Process – three phases



UX Sketch Segmentation



Launch Page

SwiftScale

What is Swift Scale?

Browse the Community

Plan your Deal

Log In

Manage Your Deal & Be a Part of a Community of Practice

Learn More...

1 Manage your deal:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam nibh. Nunc varius facilisis eros. Sed erat. In in velit quis arcu ornare laoreet. Curabitur adipiscing luctus massa. Integer ut purus ac augue commodo commodo. Nunc nec mi eu justo tempor consectetur. Etiam vitae nisl. In dignissim lacus ut ante. Cras elit lectus, bibendum a, adipiscing

Sign Up to Start an Organization Space

2 Working with the Community:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam nibh. Nunc varius facilisis eros. Sed erat. In in velit quis arcu ornare laoreet. Curabitur adipiscing luctus massa. Integer ut purus ac augue commodo commodo. Nunc nec mi eu justo tempor consectetur. Etiam vitae nisl. In dignissim lacus ut ante. Cras elit lectus, bibendum a, adipiscing

Join the Community of Investment Practitioners

PERSONAL INFORMATION: *Following Diagram Entry Fields*

Already have a personal account?

Community ID	Personal PW
--------------	-------------

New to SwiftScale? Please create a personal account.

Disclaimer: Information will not be shared with any third party.

Starred fields are required fields.

Name*		
Personal Phone Number*		
Personal E-mail*		
Personal Address	Country	
City	CA ▼	Zip Code


Personal ID*	
Personal Password*	
Re-enter Password*	
Subject Matter Expertise* ▼	Select an Additional Expertise

PLACE/CROP	Insert Photo
	From Web <input type="text" value="Link"/>
	From Computer <input type="button" value="Browse..."/>
	<input type="button" value="Take Photo"/>

Confidential and Proprietary

New Organization

SwiftScale

 Juan Davis ◀

ORGANIZATION INFORMATION:

Already part of an organization? Sign in [here](#).

Starting a new SS organization? Sign up here.



Number of Seats:

Admin: Juan Davis

Org ID

Principal ID

Principal PW

Starting a new SS

Org ID

Org Address

Org City

Industry(ies)

Admin: Juan Davis

INDUSTRY SPECIFICS

Nationality (UN nation code) 

American - 840

Add Another Nationality

International Industry List Hierarchy - with associated codes

Search 

[Browse List](#)

Misc. Repair (except computers)

3267 Audio Equipment and T.V. Repair

3133 Electrical and Electronic Equipment Repair
Except Audio and T.V.

3215 Furniture Repair/ Reupholstery

4566 Other Equipment Repair

Trade, Retail-Selling Goods to Individuals and Households

3038 Catalogue or Mail Order

Electrical and Electronic Equipment Repair Except Audio and T.V.
ISIC: 3133


Size of Business (Revenue)

Add Another Industry

DONE

Organization – in its space

SwiftScale

 Juan Davis ◀

Please Review Your Information

ORGANIZATION INFORMATION:

Soogle Inc. 307 employees
1606 Amphitheatre Parkway Seats: 75
Palo Alto, CA 94302

Edit


INDUSTRY SPECIFICS:

Industry: Electronic and Electrical Equipment Repair
Nationality: American - 804
ISIC: 9133
Size (Revenue): 100 B

Edit

Principal – Person's Org Affiliation

SwiftScale

 Juan Davis ◀

PRINCIPAL INFORMATION


1. IT development

Business Development Team

SwiftScale Business Development Investments Advisors "SPATIAL VIEWER" Juan Davis

Account Details
Logout

MANAGE BUSINESS DEVELOPMENT TEAM


 CEO, *Google*
ADMIN: Juan Davis


304 employees
Seats: 75

Google Inc.
1606 Amphitheatre Parkway
Palo Alto, CA 94302

[Company Profile as homepage.](#)
[Other info?](#)

Business Development Team ▼ Number of Seats: 8

 ACCOUNTS MANAGER (Pending) [Their acceptance](#)
Jeff Franco ×

 CHIEF OPERATIONS OFFICE (Pending)
Lillian Thomas


Invitee enters new BD member's information

Confidential and Proprietary

Engage Advisors

SwiftScale | Business Development | Investments | **Advisors** Juan Davis ◀

Advisory List | [back to the list](#)




James Basu (Adv. Mng.)
TechySpot

Advisory MaterialsAdvisor Staff



Add Advisory Materials

New Frontiers in Printer Repair	Deal Pitch: Buy Side	Juan Davis ✕
Assembling Tech Staff: Potential Issues	Case Studies/Precedents	James Basu ✕

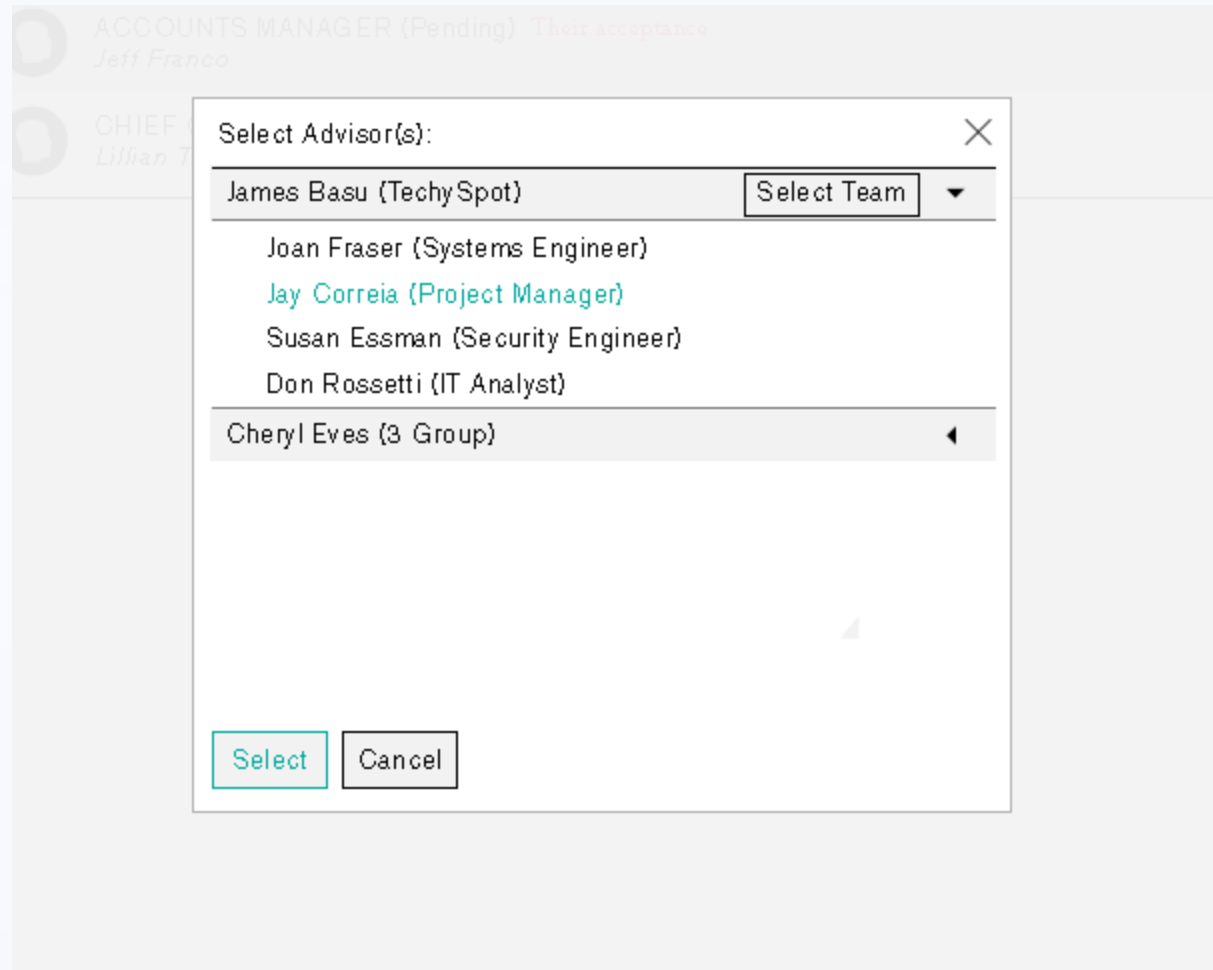
Advisor Staff

SwiftScale Business Development Investments **Advisors**  Juan Davis

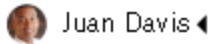
Advisors

 <i>James Basu</i> (Adv. Mng.) TechySpot	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 <i>Joan Fraser</i> (Adv. Staff) SYSTEMS ENGINEER	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 <i>Jay Correia</i> (Adv. Staff) PROJECT MANAGER	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 <i>Susan Essman</i> (Adv. Staff) SECURITY ENGINEER	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 <i>Don Rossetti</i> (Adv. Staff) IT ANALYST	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Assign to Teams



Characterize intended investments

Swift Scale Business Development **Investments** Advisors 

Investment Characteristics conditional menu btms appear after the admin has characterized the aspects of the investment

The condition for this btms appearance is that you have selected an investment from the dashboard

INVESTMENT CHARACTERISTICS: Edit

Making or Recieving Investment? ▾	Revenue (range) ▾
Kind (M&A, PE, VC...) ▾	Risk Tolerance (range) ▾
Industry(ies) 🔍	Gets same treatment as industry entry in Investor Space (this spot being for the investee)

Industry: Manufacture of Mattresses
Nationality: European/Japanese
NACE: C31.0.3
JSIC: 1313
ISIC: 3100
Size (Revenue): 20.071.002.029 Edit

Industry profiles as they are entered

These profile summaries would appear after the admin had characterized these investments

Strategic Intent

Swift Scale Business Development Investments Advisors Space:1 Juan Davis ◀

Investment Characteristics Strategic Intents

STRATEGIC INTENTS

<input checked="" type="checkbox"/> ON	New Market	<input checked="" type="checkbox"/> ON	Culture
<input checked="" type="checkbox"/> ON	Personnel	<input checked="" type="checkbox"/> ON	Intellectual Property
<input checked="" type="checkbox"/> ON	Brands	<input type="checkbox"/> OFF	Risk Management
<input type="checkbox"/> OFF	Capacity	<input checked="" type="checkbox"/> ON	Assets & Liabilities
<input type="checkbox"/> OFF	Equity	<input checked="" type="checkbox"/> ON	Profitability
<input checked="" type="checkbox"/> ON	Cash Flow	<input type="checkbox"/> OFF	Customers
<input checked="" type="checkbox"/> ON	Product Development	<input type="checkbox"/> OFF	Product Operations

Affected Functions

Swift Scale

Business Development | **Investments** | Advisors

Space:1



Juan Davis ◀

Investment Characteristics | Strategic Intents | **Processes/Functions**

PROCESSES/FUNCTIONS



Human Resource Management



Technology and Process Development



Operations



Procurement, Logistics, Distribution



General Management and Infrastructure



Customer and After Sales Service




Product and/or Service Development



Marketing, Sales, and Customer Accounts

Deals

Swift Scale Business Development Investments Advisors

Inv. Space:1  Juan Davis ◀

DEAL DASHBOARD

You have not yet initiated a deal Add a Deal

1) Establish Deal Basics:

Please Select/Invite a Deal Manager

from org members (at this point only admin)

Invite Deal Manager

Define Investment Characteristics

Manage Deals

Investments List

✕ NEXT


Deal Objectives derive from Investment Intents

SwiftScale Business Development **Investments** Advisors Inv. Space:1  Juan Davis ◀

2) Set Deal Objectives: DEAL: Chesnut ◀

<input checked="" type="checkbox"/> ON	New Market	<input checked="" type="checkbox"/> ON	Culture
<input checked="" type="checkbox"/> ON	Personnel	<input checked="" type="checkbox"/> ON	Intellectual Property
<input checked="" type="checkbox"/> ON	Brands	<input type="checkbox"/> OFF	Risk Management
<input type="checkbox"/> OFF	Capacity	<input checked="" type="checkbox"/> ON	Assets & Liabilities
<input type="checkbox"/> OFF	Equity	<input checked="" type="checkbox"/> ON	Profitability
<input checked="" type="checkbox"/> ON	Cash Flow	<input type="checkbox"/> OFF	Customers
<input checked="" type="checkbox"/> ON	Product Development	<input type="checkbox"/> OFF	Product Operations

Override affected Processes & Functions

Swift Scale Business Development Investments Advisors Inv. Space:1  Juan Davis ◀

3) Override Processes / Functions: DEAL: Chesnut ◀

<input checked="" type="checkbox"/> ON	Human Resource Management	<input checked="" type="checkbox"/> ON	Technology and Process Development
<input checked="" type="checkbox"/> ON	Operations	<input checked="" type="checkbox"/> ON	Procurement, Logistics, Distribution
<input checked="" type="checkbox"/> ON	General Management and Infrastructure	<input checked="" type="checkbox"/> ON	Customer and After Sales Service
<input checked="" type="checkbox"/> ON	Product and/or Service Development	<input checked="" type="checkbox"/> ON	Marketing, Sales, and Customer Accounts

Create Deal Teams

SwiftScale Business Development Investments Advisors Inv. Space:1 Juan Davis ◀

Deal Teams: DEAL: Chesnut ◀

Human Resource Management Add Manager Will assemble this team

Technology and Process Development Add Manager

Operations Add Manager

Procurement, Logistics, Distribution Add Manager

General Management and Administration Add Manager

Customer and After Sales Add Manager

Product and/or Service Development Add Manager

✕

Name


E-mail

Add a Message...





Send

Confidential and Proprietary

Request the Due Diligence Information

SwiftScale | Business Development | **Investments** | Advisors | Inv. Space:1 |  Juan Davis ◀

Deal Teams: | Wall | Advisors | DEAL: Chesnut ▾

<i>Human Resource Management</i> Request DD Artifacts	Objectives Processes/Functions Teams Deal Conference Deals Dashboard
<i>Technology and Process Development</i> Request DD Artifacts	 TM: Alex Katz
<i>Operations</i> Request DD Artifacts	 TM: June Thomas
<i>Procurement, Logistics, Distribution</i> Request DD Artifacts	 TM: Abe Cople
<i>General Management and Infrastructure</i> Request DD Artifacts	 TM: Charles Jencks

Information is Uploaded

Swift Scale Teams Inv. Space: 1 Lydia Johns

Human Resources Documents Wall Advisors DEAL: Chesnut

1. All management employment contracts, "golden parachute agreements," severance agreements, consulting agreements, "stay" agreements, and agreements not to compete to which the Company is a party. [Edit Docs](#)
2. All labor contracts, collective bargaining agreements, union agreements, and any consents, waivers or amendments. [Edit Docs](#)
3. An organizational chart which lists the name and title of each divisional Vice President and Director. Include the number of direct reports by functional area under each Manager. [Edit Docs](#)
4. A list of the executive employees of the Company, and employees of the Company who are not executive employees but who are in the top management of the Company. [Edit Docs](#)

Add Docs [X]

Please provide copies of employee benefit plans and any related trust, insurance policy, annuity contract, or other funding vehicle


EMPLOYEE_BENEFIT_PLANS_11	[Folder Icon]	[X]
EMPLOYEE_BENEFIT_PLAN_Juno.pdf	[Document Icon]	[X]
BENEFIT_PLANS_11_2	[Folder Icon]	[X]
POLICIES_11_1	[Folder Icon]	[X]
POLICIES_11_davies.pdf	[Document Icon]	[X]

[Upload another file or directory](#)


[Done](#) [Cancel](#)

- f) a description of the funding status and non-funded liability of each Employee Benefit Plan, including but not limited to executive compensation, severance pay, and retiree medical plans; and [Add Docs](#)

Select Outcome Drivers

SwiftScale | Business Development | **Investments** | Advisors | Inv. Space:1 |  Juan Davis ◀

Deal Teams | Profiles | **Drivers** | Tasks | Conference | Advisors | DEAL: Chesnut ◀

Procurement, Logistics, Distribution |  TM: Abe Copple

DRIVERS

Objectives	Preparation	Execution	Environment	Resilience	Result
------------	-------------	-----------	--------------------	------------	--------

Are there forces in the surrounding Environment that will impede or help the Execution?

Add Driver

Are there stoppage points that require double-handling? **Supporting Variables**

Number of Warehouse Stoppage Points: Current Response ▾

Are receiving and shipping located such that throughput is maximized? **Supporting Variables**

Proximity of Receiving to Shipping: Current Response ▾

Are lane depth and width appropriate? **Supporting Variables**

ORG: INDUSTRY:
Lane Depth: 5 SKUS Lane Width: 10 FT Lane Depth: 3 SKUS Lane Width: 10 FT Current Response ▾

Is rent per square foot higher or lower than market? **Supporting Variables**

Rent Sq/Ft: Market Rent Sq/Ft: Current Response ▾

What percentage of storage capacity is utilized? **Supporting Variables**

Percentage Utilized: Current Response ▾

Profile Documents for Risk Drivers

SwiftScale | Investments Dashboard | Organization Profile | Investment Space:1 | Juan Davis

INVESTMENT TEAMS:

View: Profiles Drivers Tasks | Risk Value

- Human Resource Management | Add Advisor to Team | Risk Value
- Technology and Process Development | Add Advisor to Team | Mitigation Value
- Operations | Add Advisor to Team | Residual Value
- Procurement, Logistics, Distribution | Add Advisor to Team | Opportunity Value
- General Management and Infrastructure | Add Advisor to Team | Resultant Value
- Customer and After Sales Service | Add Advisor to Team | TM: June Thomas
- | Add Advisor to Team | TM: Abe Copple
- | Add Advisor to Team | TM: Charles Jencks
- | Add Advisor to Team | TM: Rem Koolhaas

Monitor Risk

SwiftScale Investments Dashboard Organization Profile Investment Space:1 Juan Davis

Investment Teams Profiles Drivers Tasks Conference Advisors

Procurement, Logistics, Distribution View Current Monitoring Report TM: Abe Copple

Show all task profile summary instances

Packing Process Profile Report Segment 7

PACKP-101	\$30,000	80% Probability		Sara Wilkins Packing Process Profile 1	MM/DD/YYYY HH:mm	<ul style="list-style-type: none"> Risk Mitigations Remediation
PACKP-102	\$36,000	30% Probability		Sara Wilkins Packing Process Profile 2	MM/DD/YYYY HH:mm	<ul style="list-style-type: none"> Risk Mitigations Remediation

Key Metrics Profile Report Segment 7

KEYM-101	\$39,000	60% Probability		Sara Wilkins Key Metrics Profile	MM/DD/YYYY HH:mm	<ul style="list-style-type: none"> Risk Mitigations Remediation
----------	----------	-----------------	--	-------------------------------------	---------------------	--

Warehouse Layout Profile Report Segment 7

WAR-EL-101	\$15,000	50% Probability		Charles Walker Warehouse LO Profile 1	MM/DD/YYYY HH:mm	<ul style="list-style-type: none"> Risk Mitigations Remediation
WAR-EL-102	\$40,000	70% Probability		Sara Wilkins Warehouse LO Profile 2	MM/DD/YYYY HH:mm	<ul style="list-style-type: none"> Risk Mitigations Remediation

exists only in the full team space (not team member space)

Drill into risky areas and make interventions

SwiftScale | Business Development | **Investments** | Advisors | Inv. Space: 1 | Juan Davis

Deal Teams: Profiles | Drivers | Tasks | Conference | Advisors | DEAL: Chesnut

Procurement, Logistics, Distribution | Back | TM: Abe Copple

Actions | Edit | Notes | History

Inquiry | Sara Wilkins

Mitigation

Remediation | **Warehouse Layout Profile 2** | MM/DD/YYYY | Risk

Adjust Escrow | (Warehouse Layout) | HH:mm | Mitigations

Valuation Impact | % Probability | Remediation

	% Probability	
Stoppage Points/ Double handling	60% Complete	◀
Shipping/Receiving Proximity	30% Complete	◀
Lane Size	45% Complete	▼
Width: 10 FT Comment Depth: 5 SKUS Length: 25 SKUS		
Rent Sq/Ft	40% Complete	◀
Utilization of Storage	15% Complete	◀

Monitor Task Execution by Team

The screenshot displays the SwiftScale interface for monitoring task execution. The top navigation bar includes the SwiftScale logo, tabs for Business Development, Investments, and Advisors, and a user profile for Juan Davis with an 'Inv. Space:1' indicator. Below this, a secondary navigation bar shows Deal Teams, Profiles, Drivers, Tasks (highlighted), Conference, and Advisors, along with a 'DEAL: Chesnut' dropdown and a 'Number of Tasks' dropdown menu.

The main content area lists five teams, each with a task description, an 'Add Advisor to Team' button, a team member profile picture, and a 'TM' label:

- Human Resource Management*: Add Advisor to Team, TM: Lily Baez
- Technology and Process Development*: Add Advisor to Team, TM: Alex Katz
- Operations*: Add Advisor to Team, TM: June Thomas
- Procurement, Logistics, Distribution*: Add Advisor to Team, TM: Abe Cople
- General Management and Infrastructure*: Add Advisor to Team, TM: Charles Jencks

Monitor & Manage Task Execution Progress

SwiftScale | Investments Dashboard | Organization Profile | Investment Space: 1 | Juan Davis

Investment Teams | Profiles | Drivers | **Tasks** | Conference | Advisors

Human Resource Management | View Current Monitoring Report | TM: Lily Baez

Show all task profile summary instances

▼ CULTURAL ASSESSMENT TASKS | Report Segment | 7 | Set Task Priority

CULTA-101
49 Tasks | 20% Complete | Jim Daniels | Cultural Assessment | MM/DD/YYYY HH:mm
 • Responsiveness
 • Information Flow
 • Information Clarity

▼ TALENT MGMT. TASKS | Report Segment | 7 | Set Task Priority

TALM-101
102 Tasks | 50% Complete | Laura Hendricks | Talent Mgmt. Assessment 1 | MM/DD/YYYY HH:mm
 • Responsiveness
 • Information Flow
 • Information Clarity

TALM-102
34 Tasks | 70% Complete | Laura Hendricks | Talent Mgmt. Assessment 2 | MM/DD/YYYY HH:mm
 • Information Flow
 • Information Clarity

▼ COMPENSATION ASSMNT TASKS | Report Segment | 7 | Set Task Priority

COMPA-101
132 Tasks | 50% Complete | Don Draper | Compensation Assessment | MM/DD/YYYY HH:mm
 • Responsiveness
 • Information Flow
 • Information Clarity

Probe or Reassign Key Tasks

SwiftScale | Business Development | **Investments** | Advisors | Inv. Space:1 | Juan Davis ◀

Deal Teams: Profiles | Drivers | **Tasks** | Conference | Advisors | DEAL: Chesnut ◀

Procurement, Logistics, Distribution | [Back](#) | TM: Abe Copple

Actions ▼ | [Edit](#) | [Notes](#) | [History](#)

Inquiry | Sara Wilkins

Prioritization


Delegation | **Warehouse Layout Profile 2** (Packing Process) | MM/DD/YYYY | HH:mm

- Responsiveness
- Information Flow
- Information Clarity


Tasks	% Complete
Stoppage Points/ Double handling	25% Complete ◀
Shipping/Receiving Proximity	80% Complete ◀
Lane Size	100% Complete ▼
Width: 10 FT Depth: 5 SKUS Length: 25 SKUS	
Rent Sq/Ft	90% Complete ◀
Utilization of Storage	20% Complete ◀

[Comment](#)


Identify areas of greatest impact

SwiftScale Business Development **Investments** Advisors Inv. Space:1  Juan Davis ◀

Deal Teams: Profiles Drivers **Tasks** Conference Advisors DEAL: Chesnut ◀

Human Resource Management [View Current Monitoring Report](#)  TM: Lily Baez


Report Segment: *TALENT MGMT* ? [Back to Task List](#)

TALM-101  *Laura Hendricks* **Talent Mgmt. Assessment 1** (Talent Management) MM/DD/YYYY
HH:mm

TASKS: ● Responsiveness IMPACT: ● Risk
● Information Flow Total Potential Impact: \$70,000 ● Mitigations
● Information Clarity Probably Impact: \$43,000 ● Remediation

102 Tasks
71 Completed
30 Prioritized Combiner Task/Profile Summaries

12 Incomplete Prioritized [Publish to Monitoring Report](#) ? Show Notes ◀

TALM-101  *Laura Hendricks* **Talent Mgmt. Assessment 2** (Talent Management) MM/DD/YYYY
HH:mm

TASKS: ● Responsiveness IMPACT: ● Risk
● Information Flow Total Potential Impact: \$57,000 ● Mitigations
● Information Clarity Probably Impact: \$21,000 ● Remediation

34 Tasks
24 Completed
6 Prioritized

0 Incomplete Prioritized [Publish to Monitoring Report](#) ? Show Notes ▼

6/18/2012	Additional Attention to Search Process	Click to show/edit	Tasks	Delete
6/14/2012	Watching Damien Spin Plates	Annotation made in Task or Profile view...	Tasks	Delete
6/09/2012	Tracking New Hire Efficacy		Tasks	Delete

[Add Note](#)

Push Progress Reports to Teams

SwiftScale Business Development Investments Advisors Inv. Space:1 Juan Davis

Deal Teams: Profiles Drivers **Tasks** Conference Advisors DEAL: Chesnut

Human Resource Management **Publish/Send Monitoring Report** TM: Lily Baez

HUMAN RESOURCE MONITORING REPORT 2 SEPT. 12, 2012 [Back to Task List](#)

Search for Profile

CULTA-101 Jim Daniels **Cultural Assessment** (Cultural Assessment) MM/DD/YYYY HH:mm

Send To/Notify:

Teams:

- Human Resource Management
- Jim Daniels
- Laura Hendricks
- Don Draper
- Sheryl Shapiro
- Hurvin Anderson
- Jim Dine
- Technology and Process Development
- Operations
- Procurement, Logistics, Distribution
- General Management and Infrastructure
- Customer and After Sales Service
- Product and/or Service Development
- Marketing, Sales, and Customer Accounts
- Technology and Process Development

Confidential and Proprietary


Teams Track Activity as it happens

SwiftScale Business Development Investments Advisors Inv. Space:1 Juan Davis ◀

Deal Teams Profiles Drivers Tasks Conference Advisors DEAL: Chesnut ◀

Procurement, Logistics, Distribution TM: Abe Copple

CONFERENCE POSTS


 Gary Shandling **TM** (Marketing, Sales, and Customer Accounts) X

Hello All,

Please let me know when you have completed your distribution assessments for the Fall and Summer Seasons for 12'. Thanks.

02/28/13 6:39PM


● Monitoring Report has been assessed as of **2/27/12 12:15PM**; please review [updates](#).

 Abe Copple **TM** X

Hi Guys,

Sarah and Charles have requested some additional assistance. Can anybody help them out this afternoon?


02/27/13 9:39AM

 Sara Wilkins 02/27/13 10:23AM X

I've got everything under control now. If Charles needs some help I'll be available later this afternoon.


Track Team Communication


● Monitoring Report has been assessed as of **2/27/12 12:15PM**; please review [updates](#).

 **Abe Copple TM** X
Reply

Hi Guys,
Sarah and Charles have requested some additional assistance. Can anybody help them out this afternoon?

02/27/13 9:39AM

 Sara Wilkins 02/27/13 9:40AM
I've got everything under control now. If Charles needs some help I'll be available later this afternoon. X

 Charles Walker 02/27/13 10:23AM
Nope- I'm all set. X

Juan: Hey Hurvin

Hurvin: Hey Juan, what's up?

Juan: Have you filled out the procurement stuff I sent over last week?

Comment

Archive Deal Information after close

The screenshot displays the SwiftScale user interface. At the top, there is a navigation bar with the SwiftScale logo and several tabs: Business Development, Investments (highlighted in teal), and Advisors. To the right of the tabs, it shows 'Inv. Space: 1' and a user profile for 'Juan Davis'. Below the navigation bar, there are more tabs: Deal Teams, Profiles, Drivers, Tasks, Conference, Advisors, and DEAL: Chesnut. The main content area shows the deal status as 'Closed Success' with a timestamp 'Since 10/28/13 18:36:05'. Below this, it indicates 'Pending decommission of space on: 4/29/14' with an 'Adjust' button. A button labeled 'Archive Deal Information' is visible. At the bottom, a modal dialog box titled 'Archive Deal Information' is open, containing the text 'Select folder for storage.' and a 'Select' button.

Functional deferments

Pushed out of the MVP

- Valuation
 - Relative and Intrinsic
- More sophisticate risk algebra
 - Relatively simple, intuitive fuzzy algebra
- Community-based construction of assessment profile templates
 - Seed with very general configuration file defined templates
- Reviewer Training
 - Training for inexperience reviewers with gating workflow
- Integration to public data sources when setting up organizations
- Moving key business events from out-of-band to in-band
 - Signing of NDAs, LOIs, investment contracts, deal close, etc.
- Support for post-deal integration
- Blinding and aggregating data across deals for data mining

Restful API

Swagger API JSON

Server Code

Doc

Client Code

Scala, Flash, Java, Objc, PHP, Python, Python3, Ruby

[BASE URL: API , API VERSION: 0.2]

Confidential and Proprietary

44

Firefox

SwiftScale

rochford.com/Symprata/API/#!/conference/updateConference_put_0

Swagger API/api-docs.json special-key Explore

/person Show/Hide | List Operations | Expand Operations | Raw

/principal Show/Hide | List Operations | Expand Operations | Raw

/organization Show/Hide | List Operations | Expand Operations | Raw

/conference Show/Hide | List Operations | Expand Operations | Raw

PUT /conference.json Update conference

Parameters

Parameter	Value	Description	Data Type
Conference	(required)	Updated conference object	Model Model Schema

Parameter content type: application/json

Conference
class conference(id: long, participants: Set[Participant] {set of Principals participating int the conference}, businessProcesses: Set[BusinessProcess] {set of canonical Business Process categories})
class Participant(orgId: long {the id of the organization the Principal belongs to}, id: long {a Principal id}, name: string {full name of the Person associated with the Principal})
class BusinessProcess(id: long {category id of the Business Process}, name: long {name of the Business Process}, businessFunctions: Set[BusinessFunction] {set of canonical Business Function categories}, folderContents: FolderContents {contents of a folder})
class BusinessFunction(id: long {category id of the

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Proposed Tech Stack

- Client Tier
 - Deferring Single Page App, iOS App
 - Would need to address security issues
 - Online clients keep improving
- Web Session Tier
 - Lift
 - Security – “resistant” to OWASP Top 10
 - Very interactive – simple comet, ajax
 - Designer friendly – UX defined separately from coded functionality
 - Will require sticky session load balancing
 - Reasonable built-in authentication – deferring SSO (Apache Shiro?)
- API Tier
 - Scalatra with Swagger code generated server and client components linked through Atmosphere
 - Lightweight, fast
- DB Tier
 - MongoDB
 - Good with “polystructured” data – e.g. metamodel defined profiles
 - Scales out well for the anticipated # of users
 - GridFS provides file management
- Main language – Scala
 - High level very expressive
 - Access to wide set of Java libs
 - Runs on tried and true JVMs
 - Strong and flexible typing facilitates security
 - Cross cutting functionality encapsulates well in traits, but aspects work as well
- Object Document Mapping
 - Casbah – support by MongoDB
 - Maps Scala objects to Mongo docs
 - Support for GridFS

Deployment Architecture

