

Account Details  
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# MANAGE BUSINESS DEVELOPMENT TEAM



CEO, *Soogle*  
ADMIN: Juan Davis

304 employees  
Seats: 75

Soogle 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 selects their own principal information

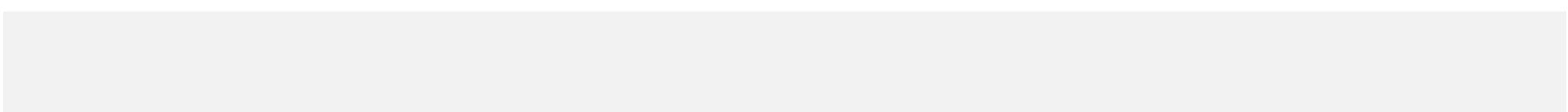
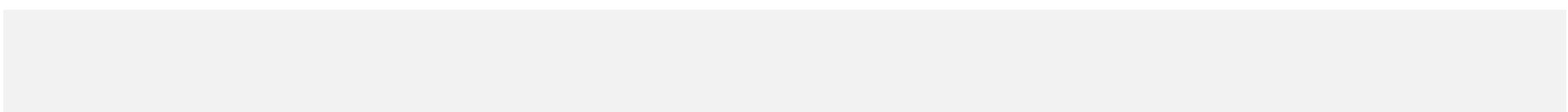
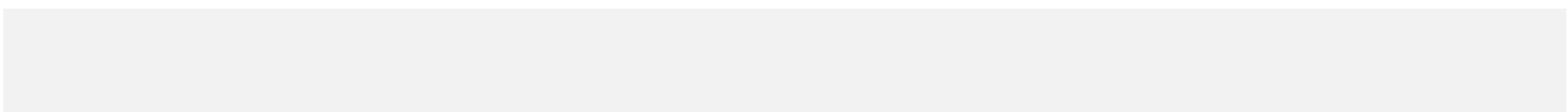
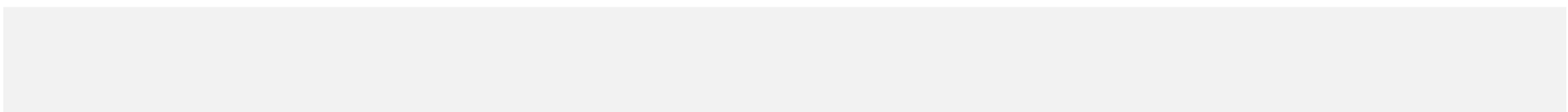
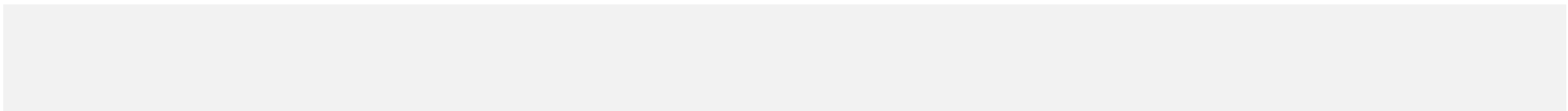
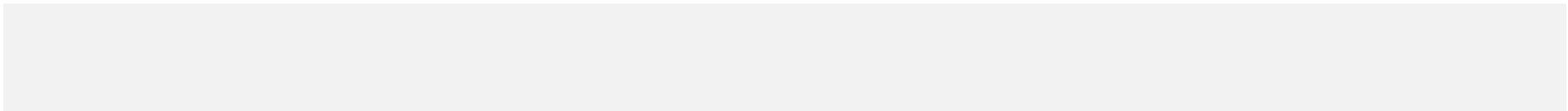
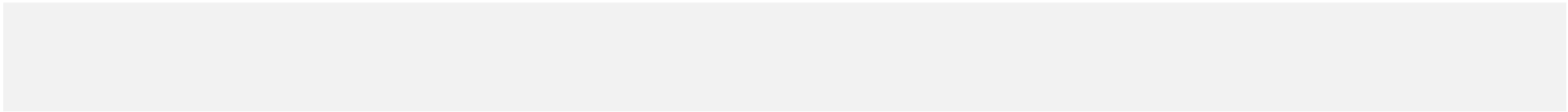
The admin has received the confirmation e-mail and is now logged in to SS. The first step is to assemble a business development team.. Note at this point the admin now has the option to go to the investments dashboard, and start the investment process through a top nav btn. It is in their best interest to establish a biz dev. team first.

ADVISORS:

Invite New Advisor

Organize by: [Date Added](#) | Industry

	<p><i>James Basu</i> TechySpot</p>	<p>Date Added: 9/23/12 Technology - Computing</p>
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After the advisor has accepted the invitation they are now placed into a new section called “advisors,” which is a list of the investments’ associated advisors. When the admin wants to enter the advisory space with an advisor, they click the advisors name in the list.

Advisory List

[back to the list](#)



James Basu (Adv. Mng.)  
TechySpot

Advisory Materials

Advisor Staff

Add Advisory Materials

All materials are brought as external files, and organized through SS



Select Materials to Upload ✕

Title

File Type

Type of Document

Add

Once in the advisory space, both the Deal Manager and the Advisor select necessary materials that they will disclose to one another. This is the broadest level advisory space; within each deal space, and deal team space, there will be independent advisory spaces.

Advisory List

[back to the list](#)



James Basu (Adv. Mng.)  
TechySpot

Advisory Materials

Advisor Staff

Add Advisory Materials

New Frontiers in Printer Repair

Deal Pitch: Buy Side

Juan Davis (X)

Assembling Tech Staff: Potential Issues

Case Studies/Precedents

James Basu (X)



So these materials are more like "how-to" materials - not documents to be reviewed in the DD sense - correct?

Right.

Once the materials have been uploaded their summaries are displayed in James Basus' Strategy Level Advisory space. Either party (Advisor, or Deal Manager/Admin) can select a document for review.

Advisors



*James Basu* (Adv. Mng.)  
TechySpot

Advisory Materials

Advisor Staff



*Joan Fraser* (Adv. Staff)  
SYSTEMS ENGINEER



*Jay Correia* (Adv. Staff)  
PROJECT MANAGER



*Susan Essman* (Adv. Staff)  
SECURITY ENGINEER



*Don Rossetti* (Adv. Staff)  
IT ANALYST



The Deal Manager/Admin can review the Advisors inventory of selected staff. They can also (along with team manager?) assign the staff member to a team. This is carried out in the team space of a specific deal. Once the member has become “affiliated” with the team space the team manager can initiate invitation process to add advisory staff member to a team.

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Number of Seats: 8 [Edit](#)[Invite New Member](#)[Add Advisor](#)ACCOUNTS MANAGER (Pending) *Their acceptance**Jeff Franco*

CHIEF

*Lillian T*

Select Advisor(s):



James Basu (TechySpot)

[Select Team](#) ▾

Joan Fraser (Systems Engineer)

[Jay Correia \(Project Manager\)](#)

Susan Essman (Security Engineer)

Don Rossetti (IT Analyst)

Cheryl Eves (3 Group) ◀

[Select](#)[Cancel](#)

The Admin would like to add an advisor to the BD team. They navigate back to the BD screen and select add Advisor. They are presented with a modal window with a hierarchy divided by Advisor Managers and their teams. The Admin has the option to select individual team members or the whole Advisor Team.