SwiftScale

Business Development | Investments | Advisors

Juan Davis

YOU HAVE NO INVESTMENTS AT THIS TIME

CREATE NEW INVESTMENT

The admin has set up their biz dev team and all members have accepted their invitations. The team must start to develop a market strategy, and their first step will be to begin characterzing their invesments...

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Investment Characteristics

conditional menu btns appear after the admin has characterized the aspects of the investment

The condition for this btns 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

Industry: Electronic and Electrical Equipment Repair
Nationality: American
NAICS: 9035
ISIC: 3133
Size (Revenue): 100 B

Edit

These entry fields appear after the Admin clicks the edit btn to the right. Unless it is the initial investment, in which case this would be the default screen (entry fields would be default)

SAVE

NEXT

After clicking the "create investment" btn the Admin is prompted to characterize their investment. The Admin works with their team externally to develop the parameters that the Admin will set on this screen. This Admin is now in the "investment spatial viewer" for their first investment.

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Investment Characteristics | Strategic Intents

STRATEGIC INTENTS

ON	New Market	ON	Culture
ON	Personnel	ON	Intellectual Property
ON	Brands	OFF	Risk Management
OFF	Capacity	ON	Assets & Liabilities
OFF	Equity	ON	Profitability
ON	Cash Flow	OFF	Customers
ON	Product Development	OFF	Product Operations

SAVE NEXT

Once the Industry/type characteristics have been defined the admin will set their strategic intents. Setting the strategic intents implicitly sets the data collection, risk and valuation workflows to focus on assessments in alignment with the strategic intents of a deal. There is a new conditional menu in this space that allows the Admin to Characterize/-toggle between the aspects of their investment. New buttons for the different spaces will appear only after the admin has entered the appropriate information. this will guide the user to work through each stage as initially intended (Investment Characteristics>Strategic Intents>Processes/Functions). Once all three stages are complete the user will have an understanding of the workflow, and will have the option to toggle between the three screens as necessary. Initially, the user is guided to the next screen after hitting the save btn at the bottom of the screen.

PROCESSES/FUNCTIONS

ON Human Resource Management

ON Technology and Process Development

ON Operations

ON Procurement, Logistics, Distribution

ON General Management and Infrastructure

ON Customer and After Sales Service

ON Product and/or Service Development

ON Marketing, Sales, and Customer Accounts

FINISH

To finish the characterization of the investment, the Admin sets the processes/functions. The Admin is the only member of the team who has the ability to set the processes/functions.