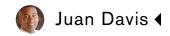
**SwiftScale** 

Business Development

Investments

Advisors



YOU HAVE NO INVESTMENTS AT THIS TIME

**CREATE NEW INVESTMENT** 

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



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** 

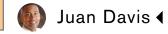
**SwiftScale** 

**Business Development** 

Investments

Advisors

Space:1





## 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**