INSIGHT
BY POLYVISION

Name : _____

Email : _____

Age : _____

Browser used : _____

Persona 1:

You are an employee of SMU Ventures – the investment arm of SMU. SMU Ventures provide venture debt financing to companies backed by venture capitalists. On a daily basis, you meet potential companies and venture capitalists. You use a system – INSIGHT to manage deals as well as track relationships.

Scenario 1: (15~ Minutes)

Earlier last night, you attended an annual SMU networking event. You spoke to Alan Tan, the CEO of TravelBank, an existing company logged in INSIGHT. TravelBank develops a travel and expense system targeting small and medium businesses. The software predicts travel expenses for employees and gives cash rewards if they spend under budget. Alan shares that his company was recently funded by Venture Capital firm – Accel Partners and is interested in requesting for USD5,000,000 for his company. You log in to INSIGHT, record the updates about TravelBank and sends a file request to Alan for supporting documents for the fund application.

Task 1: Log in to INSIGHT with the following credentials.

Email: (their existing account)
Password: (their existing account)

Task 2: Find UAT3-TravelBank's company profile

Start time: _____   End time: _____

Q1: What is the address of TravelBank?	Answer:

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1   2   3   4   5

Did you face any difficulties in performing the task? Are there any areas for improvement?

Task 3: Edit TravelBank's company profile and add Accel Partners1 (a new Venture Capitalist) as a Venture Capitalist that has funded the company.

Start time: _____   End time: _____

Q1: Name the other Venture Capitalists that have funded TravelBank.	Answer:

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1	2	3	4	5

Did you face any difficulties in performing the task? Are there any areas for improvement?

Task 4: Add a deal with the following details.

Start time: _____   End time: _____

Company: UAT3-TravelBank
Request Amount: US Dollar 5,000,000
Product: Expansion
Relationship Manager: *[yourself]*
Remarks: High roller
Deal Stage: Due Diligence
Priority: High

Contact Person Name: *[your name]*
Contact Person No.: *[any number]*
Contact Person Email: *[your SMU email]*

Check the option to send all contact person a file request link via email & **customize** an invitation email.

Q1: Did you receive an invitation email in your SMU email? Which email address was the invitation sent from?	Answer:

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1	2	3	4	5

Did you face any difficulties in performing the task? Are there any areas for improvement?

You decide to jolt down some important points discussed about the company last night.

Task 5: Add a deal note with the following details

Start time: _____   End time: _____

        Meeting Date: 25/10/2016
        Meeting Venue: SMU Admin Building
        Attendees: Alan, [your name]
        Notes Details: It was an Alumni Networking Event. Company was funded by Accel
Partners recently.

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1	2	3	4	5

Did you face any difficulties in performing the task? Are there any areas for improvement?

You create a custom notification to remind yourself to review files uploaded by TravelBank.

Task 6: Create a custom notification with the following details.

Start time: _____   End time: _____

        Notification Title: Review TravelBank's files
        Date: 4/11/2016
        Time: 12:00PM

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1	2	3	4	5

Did you face any difficulties in performing the task? Are there any areas for improvement?

Scenario 2: (~10 Minutes)

You recall that you have a pending covenant review for TrustPilot and proceed to review the files uploaded.

* Covenant reviews are checks to ensure that the borrowing company adhere to certain limits in the firm's operations. For example, not to allow certain ratios to fall below or go over an agreed limit.

Task 1: Navigate to covenant review and review the files uploaded for UAT3-TrustPilot – SGD 1,000,000 for Hire Purchase.

Start time: _____   End time: _____

Q1: How many files are uploaded?	Answer:

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1	2	3	4	5

Did you face any difficulties in performing the task? Are there any areas for improvement?

Scenario 3: (~5 Minutes)

There is a meeting with your boss tomorrow at 9am to review recent companies. You export the information of 3 potential companies, Tea Party, DocDoc and CodaPayment into PDF to show your boss tomorrow.

Task 1: Export information of Tea Party, DocDoc and CodaPayment into PDF format

Start time: _____   End time: _____

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1   2   3   4   5

Did you face any difficulties in performing the task? Are there any areas for improvement?

At the end of the day, you decide to backup all information on INSIGHT to your desktop.

Task 2: Backup all information on INSIGHT

Start time: _____   End time: _____

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1   2   3   4   5

Did you face any difficulties in performing the task? Are there any areas for improvement?

You realised that the company did not upload their capitalization table and remembered that the company sent it to you via email a few days ago. You upload the file to the covenant review tab as a capitalization table.

Task 2: Download capitalization.xlsx from www.tinyurl.com/PolyvisionUat3File and upload it to the covenant review tab as a capitalization table.

Start time: _____   End time: _____

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1   2   3   4   5

Did you face any difficulties in performing the task? Are there any areas for improvement?

Persona 2:

You are Alan Tan, the CEO of TravelBank. Last night, you met an SMU Venture executive at the annual SMU Networking event and expressed your interest in requesting for USD 5,000,000. The SMU Venture executive said he will send an email requesting for supporting documents for the fund application.

Scenario 1: (~5 Minutes)

The next day, you received an email requesting for supporting documents.

Task 1: Click on the file request link sent to your email. Upload 1 file to each category (pitch deck, financial document, capitalization table, name card, others) according to the upload guidelines.

Start time: _____   End time: _____

Q1: Were you able to upload the files? Was there any message displayed after you have uploaded the file? If so, what was the message.	Answer:

Rate the ease of performing the task. (1 – Very difficult, 5 – Very easy)

1	2	3	4	5

Did you face any difficulties in performing the task? Are there any areas for improvement?

~ End of INSIGHT Experience ~

Post-Test Questions: (~10 minutes)

1. Rate the overall ease of use of INSIGHT. (1 – Very difficult, 5 – Very easy)

1   2   3   4   5

2. Rate the usefulness of INSIGHT in managing deals and track relationships with potential investable companies. (1 – Not useful, 5 – Very useful)

1   2   3   4   5

3. Are there any additional functions you would like to see which will help in managing deals and tracking relationships with potential investable companies?

4. List down 2 things you like about INSIGHT

5. List down 2 things you dislike about INSIGHT

6. Other comments (if any)

~ Thank you so much for your help. PolyVision appreciates it! :) ~