INSIGHT USER ACCEPTANCE TEST 1

Name: _____   Age: _____

Email: _____

Assessor: _____

Start Time: _____

Instructions:

- This User Acceptance Test is meant to examine the knowledge/experience that individuals like yourself who may have dealt with CRM/ECM platforms (e.g. SharePoint, Salesforce) to help us examine the viability of our platform INSIGHT and point out design/conceptual flaws with our system. Please give us as much feedback (+ve or –ve) based on your experience through each stage of the process

- In this User Acceptance Test, there are four scenarios to accomplish. Complete the questions that follow each of the Tasks to ensure you better understand each task. Record the current upon completing each task.

- Follow the steps/tasks and attempt to do them to the best of your ability. The entire experience should take 70 minutes (including above). Thank you!

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Scenario 1: (5 Minutes)

You have been employed by SMU Ventures – the investment arm of SMU. You have recently been granted access to their internal portal – INSIGHTS where they manage their deals as well as track relationships with potential investable company and partnering VC. Your access credentials have been sent to you via the email you signed up with.

Task 1: Log in to INSIGHT. Navigate to the Profile page.

Question 1: How many checkboxes are there under the Settings tab?	Answer:

Time after task completion:

Scenario 2: (20 Minutes)

Earlier last night, you made a contact at an annual SMU networking event and need to log it into INSIGHT for future reference.

Task 1: Navigate to Add Company page. Add a company with the following details

> **Company Name:** SigOpt
> **Description:** SigOpt is the optimization platform that amplifies your research. SigOpt takes any research pipeline and tunes it, right in place.
> **Address:** San Francisco, CA USA
> **Region:** Central America
> **Date Founded:** 01/11/2014
> **Website:** https://sigopt.com/
> **Industry:** Infocomm Products
> **Revenue:** Above $1,000,000
> **Referral Person:**
> **Company Stage:** Series A
>
> **Contact Person Name:** Scott Clark
> **Contact Person Contact No.:** 340983210982
> **Contact Person Email:**

Question 1: List the three headers tabs you find after you've created a company?	Answer: 1) Name 2) 3)

Time after task completion:

Task 2: Find and edit the company you just added. Include another Contact Person.
> **Contact Person Name:** John Carter
> **Contact Person Contact No.:**
> **Contact Person Email:**

Question 2: Did your screen show anything after you have made the change? If yes, what? Move on after an attempt.	Answer:

Time after task completion:

Task 3: Add a company note with the following details

Meeting Date: <u>13/9/2016</u>
Meeting Venue: <u>SMU Admin Building</u>
Purpose of Meeting: <u>Cultivation</u>
Attendees: <u>Scott Clark, [your name]</u>
Notes Details: <u>It was an Alumni Networking Event. He intends to do a $10m deal with us.</u>

Question 3: What is the function of each icon at the last column after you have added a company note.	Answer: 1) 2) 3)

Time after task completion:

Task 4: Add a deal with the following details

Company: <u>SigOpt</u>
Request Amount: <u>US Dollar 10,000,000</u>
Product: <u>Expansion</u>
Relationship: *[yourself]*
Remarks: <u>High roller</u>
Deal Stage: <u>Due Diligence</u>
Priority: <u>High</u>

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

<u>Check</u> the option to send all contact person a file request link via email & <u>customize</u> an invitation email.

Question 4: From which email address did you receive the request link?	Answer:

Time after task completion:

Scenario 3: (5 Minutes)

Take on the role of Scott Clark – CEO of SigOpt. You met an SMU Venture executive at the annual SMU Networking event and he/she promised to help you receive funding for your expansion. In order for your $10m funding request to be approved, SMU Ventures have requested for more information on your company via email.

Task 1: Click on the file request link provided in your email. Upload any file from the list of files provided according to the instructions provided on screen.

Question 1: Was there any message being displayed after you have uploaded the file? If so, what was the message.	Answer:

Time after task completion:

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Scenario 4: (15 Minutes)

A week has passed. Being a highly responsible SMU Venture executive, you decided to take the initiative and check if the relevant documents have been uploaded for review.

Task 1: Verify against your SMU email that you have been receiving regular email updates on the SigOpt deal.

Question 1: What are the email headers for the updates?	Answer:

Time after task completion:

Task 2: Upload your any 2 files into the VGP Exclusive category.

Question 2: What happens to the first file after you have uploaded the 2nd file?	Answer:

Time after task completion:

Task 3: Add a deal note with the following details:

    Meeting Date: 13/9/2016
    Meeting Venue:
    Purpose of Meeting:
    Attendees:
    Notes Details: Verified the documents uploaded.

Question 3: What is the date created?	Answer:

Time after task completion:

Scenario 5: (15 Minutes)

Your supervisor – Donald Clinton, noticed a similar deal to the one you just recorded and would like you to reference his prior analysis. However, he only remembers the name of the company was Niantic Labs, and that he made a deal note about meeting with the founder at the nearby Bras Basah Starbucks to learn more about their revenue model.

Task 1: Search for the deal your supervisor was referring to.

Question 1: How much was the deal worth?	Answer:

Time after task completion:

~ End of INSIGHT Experience ~

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Post-Test Questions: (10 minutes)

Q1) What was the overall experience of INSIGHT. How did you find the application?

*(Comment about the viability/potential of INSIGHT, its' flaws and successes, the ideas utilized, the design and the ease of using it. Any other feedback you can give would be very helpful too. If you've screenshots, please email them to your assessor. Try to be as **critical** as you can.)*

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

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