

Name : \_\_\_\_\_  
Email : \_\_\_\_\_  
Age : \_\_\_\_\_  
Browser used : \_\_\_\_\_

### 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 pre-test questions, three scenarios and post-test questions to be accomplished. You will be playing the role of two different personas in the scenarios. Complete the questions that follow each of the tasks to ensure you better understand each task. Record the start time upon the start of each task and the end time upon completion.

Follow the steps/tasks and attempt to do them to the best of your ability. The entire experience should take around 50 minutes. Thank you!

**Pre-Test Questions: (~5 minutes)**

The following questions are for us to find out more about your knowledge on Venture Debt. Circle the most appropriate answer.

**1. What is a Venture Debt?**

- a. A bank loan to pay the start-up costs of a new firm
- b. A bank loan for venture equity-backed companies
- c. A bank loan in exchange for share of ownership in the company

**2. Which of the following is NOT an advantage of a Venture Debt?**

- a. Provides growth capital with minimal equity dilution
- b. Venture debt makes venture capital more efficient by leveraging the existing equity investment in a start-up company
- c. No interest rate
- d. Venture debt providers are usually less involved than a venture capitalist in the management of the company

**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: tester1@gmail.com

Password: Tester1!

**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**RequestAmount:** US Dollar 5,000,000**Product:** Expansion**Relationship Manager:** Tester1**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?

---

## **Scenario 2: (~10 Minutes)**

*After sending the file request to Alan, 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?

---

*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 as a capitalization table.*

**Task 2: Download capitalization.xlsx from [www.tinyurl.com/PolyvisionUat3File](http://www.tinyurl.com/PolyvisionUat3File) and upload 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 SMU 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! :) ~**