Venturelytic

Implementation Design Guide

1. Purpose

At Venturelytic, we understand that implementing a SaaS solution can be complex. That's why we've developed our Implementation Design Guide—an invaluable resource to help you navigate the implementation journey effectively. Here's why our guide is essential for your SaaS implementation:

1. **Streamline the Implementation Process:**
   Our design guide provides a structured framework and recommended steps to streamline your implementation. We believe in efficiency and a smooth transition to your new SaaS solution.

2. **Tailor the Solution to Your Needs:**
   Customization is key. With our design guide, you can select the components and features that align with your unique requirements, ensuring a solution tailored to your business.

3. **Define Implementation Scope and Timeline:**
   Clear definition of project scope is vital. Based on your choices, we help you prioritize components, allowing you to set realistic timelines and expectations for a well-planned implementation.

4. **Facilitate Communication and Collaboration:**
   Effective communication is crucial for success. Our design guide acts as a reference, fostering shared understanding between our implementation team and your stakeholders, promoting collaboration and alignment.

With our Implementation Design Guide, you'll navigate your SaaS implementation with confidence. By following our structured approach and customizing the solution to your needs, you'll experience streamlined processes, collaboration, and successful adoption.

2. Basic Implementation & Customer Specific Add-ons

In your SaaS implementation journey, it's important to understand the distinction between the basic implementation and customer-specific add-ons. Let's dive into this difference, considering your unique requirements.

Basic Implementation:
Our Basic Implementation Package is designed to get your team successfully up and running within a few weeks. It covers the customization of the core components of our tool to ensure it aligns with your business workflow. Through a dedicated workshop, we map your current workflow, identify custom fields, and set up structure to manage user permissions. With comprehensive user and admin training, you'll be ready to hit the ground running with our application.

Customer-Specific Add-ons:
We understand that every investor may have unique requirements beyond the basic implementation. Customer-specific add-ons offer the flexibility to tailor our solution further to address your specific business processes or nuances. These add-ons go beyond the standard offering and provide you with an even further personalized experience that aligns with your needs.

3. Breakdown of Implementation Components

This chapter provides a breakdown of the different components of the basic implementation and potential customer-specific add ons, grouped by their use or purpose.

Field Creation and Configuration	
Creation of client-specific fields on various objects of the application in which client can store custom data points.	
Standard	**Add-ons**

☑ Field creation of core objects
  ☑ Accounts
  ☑ Contacts
  ☑ Investment Opportunities*
  ☑ Investment Monitoring*
☑ Deal team configuration
☑ IO & IM stage configurations**
	☐ Field creation on additional objects, such as:
	  ☐ Tasks
	  ☐ Evaluations
	  ☐ Funding instruments
	  ☐ Funds

** depending on module* *** IO = Investment Opportunities; IM = Investment Monitoring*	

Fund Structure	
Creation of customer-specific funds and enablement of accompanying back-end processes.	
Standard	**Add-ons**
☑ Fund creation	☐ _

User Permissions and Access	
Implementation of user permissions and access controls to manage and control user access.	
Standard	**Add-ons**
☑ Creation of Profiles ☑ Configuration of Permission Sets	☐ Set-up of client-specific user permission and access control functionality

Ecosystem & Relationship Management	
Enabling users to effectively manage and nurture their network of investors, partners, and stakeholders	
Standard	**Add-ons**
☑ If required: Matching of Account record types ☑ Standard list views for core objects	☐ Configuration of (roles of) Related Accounts & Contacts on IO & IM ☐ Custom related lists with ecosystem partners and contacts ☐ __

Workflow	
Streamlining investor management by automating processes, tasks, and notifications, improving productivity and facilitating effective collaboration.	
Standard	**Add-ons**

☑ Activity timeline
☑ Notes
☑ Enablement of out-of-the-box email integration
☑ File storage on record level
☑ One record type
	☐ Custom stage logic
	☐ Custom approval processes
	☐ Automated task creation
	☐ Document management integrations
	    ☐ Salesforce Files Connect
	    ☐ Sharepoint
	    ☐ Dropbox
	☐ Advanced email integration: Einstein Activity Capture
	☐ Multiple record types

Data Quality	
Accuracy, completeness, consistency, and reliability of the data stored within the system.	
Standard	**Add-ons**

☑ Duplicate check	☐ Data quality dashboard
	☐ AppExchange data enrichment integrations:
	    ☐ Pitchbook
	    ☐ Crunchbase

Dealflow Management*	
Configuration of dealflow-specific features.	
Standard	**Add-ons**
☑ Pipeline management ☑ Std. dealflow reports and dashboard	☐ Custom dealflow reports and dashboard ☐ Pipeline Snapshots ☐ Salesforce Web-to-lead

**depending on client's selected license type*

Portfolio Monitoring*	
Configuration of monitoring-specific features.	
Standard	**Add-ons**
☑ Investment Monitoring profiles (record page) ☑ Standard portfolio overviews	☐ PortCo reporting dashboard ☐ Venture Community ☐ Multi-currency ☐ Key metric configuration ☐ Client-specific portfolio overviews

**depending on client's selected license type*

Data Import	
The process of transferring existing client data into Venturelytic.	
Standard	**Add-ons**
☐ _	Objects to import: ☐ Accounts ☐ Contacts ☐ Activities ☐ Investment Opportunities ☐ Investment Monitoring ☐ Funding ☐ Key Metrics ☐ Fund Investors and Fund Cap Table

Training	
Provision of resources and guidance to educate users on effectively utilizing the system.	
Standard	**Add-ons**
☑ Basic Key User training ☑ Admin training	☐ Basic End User training ☐ Advanced Reporting & Dashboarding ☐ Portfolio management incl. Funding & Key Metrics ☐ Venture community ☐ LP management