

LIST BUILDING: A BASIC STEP-BY-STEP GUIDE

Step 1: Finding Companies

1. Go to “List Builder 2.0” spreadsheet

The screenshot shows the 'List Builder 2.0' spreadsheet. The main title 'List Builder 2.0' is centered at the top. Below it, there are three main columns: 'Private Equity', 'Stock Leaders', and 'Portfolio Company'. Each column has a 'Link to page:' and 'Link to form:' section. The 'Private Equity' column includes links to 'PE Executives' and 'Adding PE Execs'. The 'Stock Leaders' column includes links to 'Stock Leaders' and 'Adding SL Execs'. The 'Portfolio Company' column includes links to 'List of Portfolio Companies' and 'Adding Portfolio Companies'. There is also a section for 'Execs in waiting' with a link to 'Les indésirables'. Below these columns, there is an 'Archive' section with a link to 'List Builder 1.3 Archive' and a 'Useful Documents' section with links to 'Exodus (Do not touch)', 'XRay LinkedIn', 'Daniel Kapper's Website Search', and 'TitanHouseSearch Website'. At the bottom, there are input fields for 'Surplus (SL)', 'Surplus (PE)', 'Date' (set to 1/17/2018), and 'Last Month', along with a 'Type email here:' field.

2. Go to “List of Portfolio Companies” (Top Right)

This screenshot is identical to the previous one, but with a red arrow pointing to the 'List of Portfolio Companies' link in the 'Portfolio Company' section, indicating the next step in the process.

- If Column A is green and marked "Good to Go" and column B is green and marked "Over a year," then the company (Column C) can be claimed. Claim a company by replacing the "Good to Go" in Column A with your name.

	A	B	C	D	E	F	G	H	I
1	Hub		Good from 1080 down		Write your name in column A				
2	Worthwhile to do?	Investment da	Company Name	Leadership Page (Corporate Page or E	Titanhouse Comp	Timestamp	VC or	How many people?	What went wrong?
1361	Save for Later (Q2 2018)	Over a year	Ranir, LLC	https://www.ranir.com/team	https://research.tit	1/17/2018 10:26:32	PE	0	
1362	Dave	Over a year	Centerline Solutions	https://www.centerlinesolutions.com/e	https://research.tit	1/17/2018 10:32:23	PE	5	
1363	Save for Later (Q2 2018)	Over a year	Santa Rosa Consulting	https://www.santarosaconsulting.com/e	https://research.tit	1/17/2018 10:32:33	PE	1	
1364	Darryl to Drew	Over a year	Prosper Marketplace, Inc.	https://www.prosper.com/about-us/mar	https://research.tit	1/17/2018 10:33:09	VC	0	
1365	Daniel Kapper	Over a year	Environmental Pest Servi	https://environmentalpestservice.com/	https://research.tit	1/17/2018 10:37:39	PE	0	
1366	Good to Go	Over a year	tracx	https://www.tracx.com/about/team/	https://research.tit	1/17/2018 10:39:20	PE	0	
1367	Good to Go	Over a year	MB Financial Bank	www.mbfinancial.com	https://research.tit	1/17/2018 10:39:23	PE	4	leadership complete in TH/ PE Back
1368	Darryl to Drew	Over a year	Brightcove	https://www.brightcove.com/en/compa	https://research.tit	1/17/2018 10:39:46	VC	0	
1369	Good to Go	Over a year	Triumph Higher Educator	https://www.bloomberg.com/research/s	https://research.tit	1/17/2018 10:46:06	PE	0	check bb article for someone
1370	Good to Go	Over a year	Viventium Software Inc.	https://www.viventium.com/leadership/	https://research.tit	1/17/2018 10:49:47	PE	0	
1371	Good to Go	Over a year	Noosh	http://www.noosh.com/management	https://research.tit	1/17/2018 10:55:16	VC	0	
1372	sandra	Over a year	Microsystems	https://www.litera.com/management-te	https://research.tit	1/17/2018 11:09:51	PE	0	
1373	Dave	Over a year	BioClinica	http://www.bioclinica.com/about/mana	https://research.tit	1/17/2018 11:43:41	PE		
1374	Dave	Over a year	Medpace, Inc.	https://www.medpace.com/about/leade	https://research.tit	1/17/2018 11:48:18	PE		
1375	Good to Go	Over a year	OpenX Technologies	https://www.openx.com/company/	https://research.tit	1/17/2018 11:55:59	VC		
1376	Good to Go	Over a year	ProVest LLC	http://web.provest.us/about/leadership	https://research.tit	1/17/2018 12:06:20	PE		
1377	Good to Go	Over a year	Affinitiv	https://www.bloomberg.com/research/s	https://research.tit	1/17/2018 12:14:22	PE		
1378	Darryl to Drew	Over a year	StreamBase Systems	https://www.tibco.com/company/leader	https://research.tit	1/17/2018 12:17:00	VC		
1379	Save for Later (Q2 2018)	Under a year	WilsonHCG	http://www.wilsonhcg.com/leadership-t	https://research.tit	1/17/2018 12:48:11	VC		
1380	Good to Go	Over a year	Dropbox	https://www.dropbox.com/about	https://research.tit	1/17/2018 12:56:27	VC		
1381	Good to Go	Over a year	BitTorrent	https://www.bloomberg.com/research/s	https://research.tit	1/17/2018 13:13:48	VC		
1382	Good to Go	Over a year	Amobee	https://www.amobee.com/company/me	https://research.tit	1/17/2018 13:21:23	VC		
1383	Good to Go	Over a year	Trulia	http://www.zillowgroup.com/leadership	https://research.tit	1/17/2018 13:26:17	VC		
1384	Good to Go	Over a year	Cisive	http://www.cisive.com/about-us/cisive-	https://research.tit	1/17/2018 13:31:19	PE		
1385	Good to Go	Over a year	ForeScout Technologies,	https://www.forescout.com/company/le	https://research.tit	1/17/2018 13:33:07	VC		
1386									

Step 2: Finding Company Information

- Column E will give you the URL to the company's TitanHouse Company Profile page. Click on it. It will bring you to a page which looks like this:

The screenshot shows the TitanHouse interface for a company profile. At the top, there's a navigation bar with the TitanHouse logo and a search bar. Below that, the company name "Viventium Software Inc." is displayed along with its URL "https://www.viventium.com/". There are buttons for "Private", "Stock Exchange", and "Ticker Symbol", and an "Import Company Data" button. The "Company Basic Information" section includes fields for "70" (likely revenue), "Last year Revenue (millions)", "Santa Rosa Resources Corp." (Company Rank), and "PE Rank". There are also fields for "Address" (768 Bedford Ave, Brooklyn, NY 11205, USA) and "Contact" information (Email: info@viventium.com, Phone: 718-522-2000). A "Description" section at the bottom provides a detailed overview of the company's services, including cloud-based HCM software, talent acquisition solutions, and payroll services. On the right side, there's a table showing the "Lastest Version(Active:true)" and "Lastest saved:2017-11-15T20:29:45Z" by "Lastest Editor:James Kilgo". Below this is a table with columns "Date", "Editor", and "Active", listing recent updates to the profile.

- This page offers you three important things: (1) The official correct name of the company, the exact wording of which should be submitted in Forms (2) See if there are already any people listed under "Current Executives." If there are, take note of these individuals (3) Note the P/E investment date. This date must match the date submitted in Forms

Activity Viewed Paul J. Kane CPA > Viewed Peter James Debney > Viewed Kristian Segerstrale >

Viventium Software Inc. <https://www.viventium.com/> Company

Private Stock Exchange Ticker Symbol Import Company Data

Company Basic Information

70 Last year Revenue (millions) Santa Rosa Resources Corp. Company Rank

--Specialty-- PE Rank

User defined tag

Address 768 Bedford Ave, Brooklyn, NY 11205, USA

Contact Email: info@viventium.com Phone: 718-522-2000

Company Industry Business Services Primary Industry

Description

Viventium Software, Inc. provides cloud-based HCM software solutions for business management. It offers talent acquisition solutions that include applicant tracking and onboarding; E-Verify, an Internet-based system that compares information from an employee's Form I-9, Employment Eligibility Verification, to data from the U.S. Department of Homeland Security and Social Security Administration records to confirm employment eligibility, and WORK OPPORTUNITY TAX CREDIT, a federal program that gives employers up to \$9,600 in tax credits per employee if the employee meets certain criteria. The company also provides payroll solutions that include dashboard, a one-touch access point; Setup tab to manage cost centers, benefit categories, users, and more all from one sleek screen, and employee profile solutions. In addition, it offers ACA COMPLIANCE; and job descriptions, policy library/employee handbook tools, law alerts, dedicated HR Pro, and HR audit, as well as HR forms, checklists, and documents. The company serves home health, nursing homes, real estate, professional and financial services, restaurants, skilled labor, and all other industries in the United States. Viventium Software, Inc. was formerly known as BDB Payroll Inc. and changed its name to Viventium Software, Inc. in October 2016. The company was founded in 1981 and is based in Brooklyn, New York.

Lastest Version(Active:true)
Lastest saved:2017-11-15T20:29:45Z
Lastest Editor:James Kilgo

Save Profile Reset Profile Merge Company

Date	Editor	Active
2017-11-15 03:29PM	Dimitrios Rizos	true
2017-10-03 11:27AM	Tiera Duppins	false
2017-10-02 03:20PM	Ryan Murphy	false
2017-10-02 03:16PM	Ryan Murphy	false
2017-10-02 03:15PM	Ryan Murphy	false
2017-09-29 02:47PM	Ryan Murphy	false
2017-09-29 02:22PM	Darryl Grant	false
2017-09-14 06:38PM	James Kilgo	false

(Scroll down)

Email: info@viventium.com Primary Industry

Phone: 718-522-2000

Description

Viventium Software, Inc. provides cloud-based HCM software solutions for business management. It offers talent acquisition solutions that include applicant tracking and onboarding; E-Verify, an Internet-based system that compares information from an employee's Form I-9, Employment Eligibility Verification, to data from the U.S. Department of Homeland Security and Social Security Administration records to confirm employment eligibility, and WORK OPPORTUNITY TAX CREDIT, a federal program that gives employers up to \$9,600 in tax credits per employee if the employee meets certain criteria. The company also provides payroll solutions that include dashboard, a one-touch access point; Setup tab to manage cost centers, benefit categories, users, and more all from one sleek screen, and employee profile solutions. In addition, it offers ACA COMPLIANCE; and job descriptions, policy library/employee handbook tools, law alerts, dedicated HR Pro, and HR audit, as well as HR forms, checklists, and documents. The company serves home health, nursing homes, real estate, professional and financial services, restaurants, skilled labor, and all other industries in the United States. Viventium Software, Inc. was formerly known as BDB Payroll Inc. and changed its name to Viventium Software, Inc. in October 2016. The company was founded in 1981 and is based in Brooklyn, New York.

COMPANY EVENTS + Add an Event

PE Investment	2014-12-22	ABS Capital Partners
PE Investment	2014-12-22	Camden Partners

Other Related Companies + Add Related Company

ABS Capital Partners	Investor
Camden Partners	Investor

Current Executives + Add another executive

Name	Position	Position Categories
Andy Kalikas	Executive Vice President - Client Experience	Customer Service Exec
Chad Crescibene	Vice President, Sales	Sales Exec
DELETE (duplicate) - Kari Haibach	Chief Financial Officer	CFO
DELETE JEFFREY Bedell	Board Member	Board of Directors
Gary Trainor	Chief Executive Officer	CEO/President

Lastest Version(Active:true)
Lastest saved:2017-11-15T20:29:45Z
Lastest Editor:James Kilgo

Save Profile Reset Profile Merge Company

Date	Editor	Active
2017-11-15 03:29PM	Dimitrios Rizos	true
2017-10-03 11:27AM	Tiera Duppins	false
2017-10-02 03:20PM	Ryan Murphy	false
2017-10-02 03:16PM	Ryan Murphy	false
2017-10-02 03:15PM	Ryan Murphy	false
2017-09-29 02:47PM	Ryan Murphy	false
2017-09-29 02:22PM	Darryl Grant	false
2017-09-14 06:38PM	James Kilgo	false

- After taking note of this information on the Titanhouse company page, go back to the “List of Portfolio Companies” sheet. Column D will give you the URL to the company’s official homepage or leadership page. Click on it and go to leadership page listing all the executives.



=HYPERLINK("#gid=364368677", "Hub")									
	A	B	C	D	E	F	G	H	I
1	Hub	Good from 1080 down			Write your name in column A				
2	Worthwhile to do?	Investment da	Company Name	Leadership Page (Corporate Page or	Titanhouse Comp	Timestamp	VC or	How many people?	What went wrong?
1361	Save for Later (Q2 2018)	Over a year	Ranir, LLC	https://www.ranir.com/team	https://research.ti	1/17/2018 10:26:32	PE	0	
1362	Dave	Over a year	Centerline Solutions	https://www.centerlinesolutions.com/le	https://research.ti	1/17/2018 10:32:23	PE	5	
1363	Save for Later (Q2 2018)	Over a year	Santa Rosa Consulting	https://www.santarosaconsulting.com/	https://research.ti	1/17/2018 10:32:33	PE	1	
1364	Darryl to Drew	Over a year	Prosper Marketplace, Inc.	https://www.prosper.com/about-us/mar	https://research.ti	1/17/2018 10:33:09	VC	0	
1365	Daniel Kapper	Over a year	Environmental Pest Servi	https://environmentalpestservice.com/	https://research.ti	1/17/2018 10:37:39	PE	0	
1366	Good to Go	Over a year	tracx	https://www.tracx.com/about/team/	https://research.ti	1/17/2018 10:39:20	PE	0	
1367	Good to Go	Over a year	MB Financial Bank	www.mbfincanial.com	https://research.ti	1/17/2018 10:39:23	PE	4	leadership complete in TH/ PE Back
1368	Darryl to Drew	Over a year	Brightcove	https://www.brightcove.com/en/compai	https://research.ti	1/17/2018 10:39:46	VC	0	
1369	Good to Go	Over a year	Triumph Higher Educatio	https://www.bloomberg.com/research/	https://research.ti	1/17/2018 10:46:06	PE	0	check bb article for someone
1370	Good to Go	Over a year	Viventium Software Inc.	https://www.viventium.com/leadership/	https://research.ti	1/17/2018 10:49:47	PE	0	
1371	Good to Go	Over a year	Noosh	http://www.noosh.com/management	https://research.ti	1/17/2018 10:55:16	VC	0	
1372	sandra	Over a year	Microsystems	https://www.litera.com/management-te	https://research.ti	1/17/2018 11:09:51	PE	0	
1373	Dave	Over a year	BioClinica	http://www.bioclinica.com/about/mana	https://research.ti	1/17/2018 11:43:41	PE		
1374	Dave	Over a year	Medpace, Inc.	https://www.medpace.com/about/leade	https://research.ti	1/17/2018 11:48:18	PE		
1375	Good to Go	Over a year	OpenX Technologies	https://www.openx.com/company/	https://research.ti	1/17/2018 11:55:59	VC		
1376	Good to Go	Over a year	ProVest LLC	http://web.provest.us/about/leadership	https://research.ti	1/17/2018 12:06:20	PE		
1377	Good to Go	Over a year	Affinitiv	https://www.bloomberg.com/research/	https://research.ti	1/17/2018 12:14:22	PE		
1378	Darryl to Drew	Over a year	StreamBase Systems	https://www.tibco.com/company/leader	https://research.ti	1/17/2018 12:17:00	VC		
1379	Save for Later (Q2 2018)	Under a year	WilsonHCG	http://www.wilsonhcg.com/leadership-t	https://research.ti	1/17/2018 12:48:11	PE		
1380	Good to Go	Over a year	Dropbox	https://www.dropbox.com/about	https://research.ti	1/17/2018 12:56:27	VC		
1381	Good to Go	Over a year	BitTorrent	https://www.bloomberg.com/research/	https://research.ti	1/17/2018 13:13:48	VC		
1382	Good to Go	Over a year	Amobee	https://www.amobee.com/company/me	https://research.ti	1/17/2018 13:21:23	VC		
1383	Good to Go	Over a year	Trulia	http://www.zillowgroup.com/leadership	https://research.ti	1/17/2018 13:26:17	VC		
1384	Good to Go	Over a year	Cisive	http://www.cisive.com/about-us/cisive-	https://research.ti	1/17/2018 13:31:19	PE		
1385	Good to Go	Over a year	ForeScout Technologies,	https://www.forescout.com/company/le	https://research.ti	1/17/2018 13:33:07	VC		
1386									

- If execs are hard to find or cannot be located on the official company website, try googling the company’s leadership. For example, search: “Viventium Software executives” or “Viventium Software leadership.” Sites such as Bloomberg or Crunchbase can be especially helpful.
- Using the official company website, a google search, or both, generate a list of the company’s executives. Once you have a list of candidates, check to make sure they are not already in TitanHouse. You can do this by double-checking the list of Current Executives listed on the Company’s Titanhouse page (See purple arrow in Step 2.2 above) against the list of candidates you want to enter into the system.

Step 3: Submitting Executives

1. Go to “List Builder 2.0” and click “Adding PE Execs” link (Left, 2nd down) and click to open Forms

The screenshot shows the TitanHouse List Builder 2.0 interface. The main title is "List Builder 2.0". Below the title, there are three main sections: "Private Equity", "Stock Leaders", and "Portfolio Company". Each section has a "Link to page:" and a "Link to form:" link. A red arrow points to the "Adding PE Execs" link under the "Private Equity" section. Below these sections, there is an "Archive" section and a "Useful Documents" section. At the bottom, there is a "Surplus" table and a "Date" field set to "1/17/2018".

Surplus (BL)	Surplus (PE)
0	1
Total Surplus	
1	

2. Begin filling out the form with all the required information, following the instructions in the form. The parts marked with a red asterisk are non-negotiable and must be filled in. If you cannot fill it in, then you cannot put this candidate into our system.

The screenshot shows the TitanHouse List Builder 2.0 (PE) form. The form is titled "List Builder 2.0 (PE)". Below the title, there is a note: "Each Executive should have at least a bloomberg or linkedin or company profile. If you cannot find at least one of these, skip that executive and move on." Below this note, there are several required fields marked with a red asterisk:

- Full Executive Name ***
Preferably as shown in Bloomberg Profile
Your answer: _____
- Portfolio Investment Date (In the company) ***
Date: _____
mm/dd/yyyy
- Executive Start Date @ Company ***
Date: _____
mm/dd/yyyy
- Portfolio Company Name ***
For example: Deloitte
.....

3. Below is an instructional guide for how to fill in the blanks in the above form. The highlighted components correspond to the blanks marked with a red asterisk in the form. They *must* be filled in. The other blanks are optional.
 - **Full Executive Name**: Taken verbatim from leadership page, Bloomberg, etc.
 - **Portfolio Investment Date**: Taken from TitanHouse Company Profile (see green arrow in step 2.2 above)
 - **Executive Start Date**: Taken from leadership page, Bloomberg, etc. If you don't have this information, you must skip the exec.
 - **Portfolio Company Name**: COPY VERBATIM from TitanHouse Company Profile (blue arrow in step 2.2 above) Even if company name in TitanHouse looks slightly different from what the company's own home page says, assume the person who put it in the system has a reason for spelling it this way.
 - **Company Profile URL**: Their corporate bio taken from the company website, if applicable
 - **Bloomberg URL**: Their corporate bio taken from Bloomberg, if applicable
 - **Other Info**: Their corporate bio/career trajectory taken from other sites, esp. but not limited to Relationship Science or Crunchbase, if applicable
 - **Pay it forward box**: A catch-all for info you think would be helpful for building a profile
 - **Your Email Address**: Put your email address. This is how we keep track of what you did.
4. Click Submit

BASIC RULES:

- You **MUST** have an employee start date for their current position. If you cannot find it anywhere, you cannot put the employee through Forms.
- You **MUST** have at least 2 work positions for the employee OR evidence that they have a lot of experience in his or her field
- Do NOT use LinkedIn for any reason

WHAT WE ARE LOOKING FOR:

- Vice Presidents or higher (known as “C-Suite executives”). Also interested in “Chief of” _____ or “Head of” _____ .
- Only include “Director of _____” if: (1) They are listed on the company leadership page and (2) there is no executive (Vice President etc.) above them who appears to fulfill their function. For example, if there is a “Director of Human Resources” listed on the leadership page but no “Vice President of Human Resources,” then that Director should go into our system
- Executive must currently reside in the United States or Canada.