LIST BUILDING: A BASIC STEP-BY-STEP GUIDE

Step 1: Finding Companies

1. Go to "List Builder 2.0" spreadsheet

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

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3. 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.

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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?			
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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					
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1382	Good to Go	Over a year	Amobee	https://www.amobee.com/company/ma	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					
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Step 2: Finding Company Information

1. 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:

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Description				
Viventium So Verify, an Inte Social Securi employee if t benefit categ	tware. Inc. provides cloud-based HCM software solutions for business management. It offers talent acquisition solutions that include applicant tracking and rel-based system that compares information from an employee's Form 1-g. Employment Eligibility Verification, to data from the U.S. Department of Homelar y Administration records to confirm employment eligibility, and WORK OPPORTUNITY TAX CREDIT, a federal program that gives employers up to \$ <u>6</u> ,8600 in the employee meets centrain ortikan's the compary tags provides payroll clusions that include abthoard, an one-souch access point South tab to manage on private scratter and the more statek screent and employee profile solutions. In addition, it offers ACA COMPLIANCE and job descriptions, policy library/of the source of the	onboarding; E- nd Security and tax credits per ost centers, employee		

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

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3. 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.

fx	=HYPERLINK("#gid=364	368677","Hub	")	•						
	А	В	С	D	E	F	G	н	I	
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2	Worthwhile to do?	Investment da	Company Name	Leadership Page (Corporate Page or I	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/le	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/a	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/mai	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 Education	https://www.bloomberg.com/research/s	https://research.tit	1/17/2018 10:46:06	PE	0	check bb article for someon	e
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		
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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/managed	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	PE			
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/ma	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			
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1386										
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- 4. 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.
- 5. 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



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.



- 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.
- <u>Portfolio Investment Date</u>: Taken from TitanHouse Company Profile (see green arrow in step 2.2 above)
- <u>Executive Start Date</u>: Taken from leadership page, Bloomberg, etc. If you don't have this information, you must skip the exec.
- <u>Portfolio Company Name</u>: 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.
- <u>Company Profile URL</u>: Their corporate bio taken from the company website, if applicable
- <u>Bloomberg URL</u>: Their corporate bio taken from Bloomberg, if applicable
- <u>Other Info</u>: Their corporate bio/career trajectory taken from other sites, esp. but not limited to Relationship Science or Crunchbase, if applicable
- <u>Pay it forward box</u>: 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 <u>NOT</u> used 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.