

TitanHouse Guide to Best Practices

Hello New TitanHouse Employees!

This document is intended to function as your go-to information document.

When information is changed we try to let you know by highlighting the said areas for the next week or so.

Please let us know if you need clarifications or can think of useful additions or betterments (the permissions of this document allow anyone with access to right click and comment).

The improvement team

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Cheat Sheet for Creating Company Profiles

Creating Company Profiles

What to include in the company profile: (If you need to create it at TitanHouse)

- Name
- Link
- Company size
- Select “public” for SL (Stock leader Company) or “private” for PE
- Enter the stock exchange for SL (NASDAQ, NYSE, etc.)
- Enter the ticker symbol for SL
- Select the tags “Mid cap” and “top performing public company” for SL
- Find the IPO (stock market listing date) and enter it - if you can’t find it let me know so I can ask John
 - Alternatively, the investment date for PE firms
- Description
- Industries
- Address
- Phone Number
- Email

Creating Executive Profiles

Which **Executives to include** (this applies to their *current* position only):

- Presidents, Head of a Division “Global Head of Tax”
- Vice Presidents, and Vice President of America or Vice President North America
 - **(Do Not Include** sub-national or regional VP’s. For example: “Vice President, Eastern Operations”. In the same vein, be cautious of “Vice President, Branch Manager” as they often include specific locations)
- Controller is the only title that does not need to include a Vice President suffix for it to be included as a titan level current job. They only need to be listed as such on the leadership page.
- C-suite executives
- General Counsel and Controller (only when they’re the top GC or controller of their company, look out for VP, General Counsel and VP, Controller first)
- Make sure the current position you are entering the candidate for has an actual start date

- Only use individuals in Canada or the US. For the candidate's location use the actual city, no the area
- **For Financial Service Companies**, if you see that there are more than 5 SVP/VP with same title, skip them. Just capture C-suit, Head of something, General Counsel, Board of Directors.
- **Don't forget to do Social Media.** (Facebook, twitter) and **other content** like (press release, interview, videos, biography, blogs) don't forget to copy and paste the URL for this in the respective field.
- **For Pictures:** Don't use LinkedIn photos, Use company pics, press releases or any other source.

Important to:

- Double check the company profile has already been created and see what execs are already entered for that company (so duplicates aren't created)

Prefixes:

- Only use Dr. for candidates with an MD

Suffixes:

- PhD, PharmD, MD, CPA, JD, CGMA, DDS, LLM, EdD.

Education:

- Do not include executive management certificates, we only want full degrees like an associates, bachelors, JD, etc.

Criteria For Adding Private Equity (PE) or Venture Capital (VC) Portfolio Titans

When a Private Equity or Venture Capital firm buys into a portfolio company they tend to take great care that new hires are top people in order to grow the company. To capture this process,

A Titan must:

- 1) a), Be hired **AFTER** the PE acquisition date, **OR** if the Executive has been kept on (or promoted) a year after the acquisition
 - b), PE Board Members that were named to the Board **AFTER** the acquisition date **OR** were retained on the Board for at least one year following acquisition. **DO NOT INCLUDE** anyone who works at a PE Firm (Their current Executive position will be at a company whose name includes words like Partners, Investments, Capital, Equity, etc.

- 2) Have at least a current position + one more piece of information (another position, education or Board Membership)
- 3) Hold the position of Vice President (or company equivalent) or higher*
 - a) No regional, associate, area, or assistant VP's
 - b) *unless they are listed on a company executive page
- 4) Resides in the United States or Canada

A Titan Cannot:

1. Come from a merger
 - a. NOTE: if lots of people are coming from the same company, it is probably because of a merger!
2. Have previously worked for the Private Equity Firm (previous or additional current position)
3. Be from a Portfolio Company subsidiary
4. Be from a Bank owned by a P/E or VC Company. We are not interested in P/E or VC-backed banking institutions.

Other Notes:

- Unless you are working on a large Portfolio Company (5k+ employees), do not add more than 25-30 people
- We want to capture Executive and Board Members
- No Portfolio Companies with PE or VC Dates before 2006 unless the company has gone through additional transactions since the firm's original investment.

The more involved section

How to Find a JD qualification

Occasionally a profile will include a law degree that suggests that the executive has a Doctor of Law (JD) but is not explicitly about this qualification. Go to www.avvo.com and paste the name of the executive into the search function. If the executive is listed as 'active' you can now place 'JD' in the suffix bar. Ta da!

Profiles not to include:

John asked us not to include profiles that give us little benefit. Specifically, this means that a profile with little information and a single (or perhaps two) longstanding job titles. Below is a good example of such a profile:

<https://www.linkedin.com/in/steven-noble-8642aa72/>

The above example has been at his current role for over 15 years and has little other useful information available such as found in a company page, Bloomberg or social media.

Another example, https://docs.google.com/document/d/1f2zlgSmuva5jhRjS-eNmlElu2aoBokY_3qk48vy4J3g/edit

Even though this profile worked for an important company, there is not sufficient information to make a meaningful profile - no job titles or meaningful tags can be produced. This profile was created because of his board Membership, but without meaningful work history, he cannot be considered.

These profiles tell us very little (and none of us feel good producing them). **Please just skip these profiles if you see them, and move on to your next Titan executive!**

How to navigate the Big Brother Document

Our Big Brother document will be your new port of call to receive Executive Profile Lists. It standardizes all of our lists and allows us to keep track of everyone more efficiently (hence its name Big Brother).

<https://docs.google.com/spreadsheets/d/14TBjp5C9AZaPnwyCsO72V0kjbUK4Q5BAj4BLGwIMaVs/edit?ts=59f3552f#gid=0>

The first thing you will notice is the new interface as the document opens:

Distributors				
Darryl	Nick Heitsch	Zaira Pirzada	Mike Astad	Steven Friedman
Dallas	Daniel Maliken	Nick Koshute		
Brad	Maxim Sobchenko	Isaac Wallace	#gid=1544938744	n Snyder
Sandra	Brian Taylor	Nick Condry	Thu Trinh	Sarina Logan
	Kirsten Michel	Anthony Morley	Dylan Dusseault	Roshani Malla
	Brendan Roy	Aaron Childers	Bradlee Sutherland	Brittany Kimzey

To navigate to your page, find your name. When a name is pressed (the screen capture shows what happens when Thu Trinh's name was pressed opening a url link in white). Press the popup url link and you will be moved to your dedicated page. When your page is populated it will look something like this example:

	Complete	Sent to Mike by Darryl	Sent to Mike by Darryl & Duplicate checked by Mike	Southern Tier Brewing	Ryan Greenway	n/a
25	Complete	Sent to Mike by Darryl	Sent to Mike by Darryl & Duplicate checked by Mike	Southern Tier Brewing	Ryan Greenway	n/a
26	In Progress	Sent to Mike by Darryl		Interventional Management Service	Damon Green	n/a
27	Complete	Sent to Mike by Darryl		Southern Tier Brewing	John Coleman	https://www
28		Sent to Mike by Darryl		Interventional Management Service	Spencer Scarbro	https://www
29	Complete	Sent to Mike by Darryl		Southern Tier Brewing	Christy Brecht	n/a
30		Sent to Mike by Darryl		Comark Corporation	Amanda Magee	n/a
31		Sent to Mike by Darryl		JMC Capital Partners	Curtis Robb	n/a
32		Sent to Mike by Darryl		Comark Corporation	Ralph Damato	n/a
33		Sent to Mike by Darryl		Interventional Management Service	Tim Geary	n/a

All the information you are used to seeing such as the company name, executive name and url links such as bloomberg and linkedin will be displayed.

When you have completed an executive profile, please use the dropdown box in Column A to show your progress. This dropdown box can be a little hinky, so if you have problems you can type into the box an outcome like 'complete' and it will allow you to choose the complete choice that will then change to the colour green.

An advantage of us having a single list distribution document is that Sandra can better anticipate when you will need profiles. This in turn allows us to better keep up with demand for Executive Names. The more accurate you are at marking your profiles the better we can provide you with names when you need them.

Enjoy!

Finding Photos using X-Ray LinkedIn as a 'jumping off' point

You cannot copy a url from a LinkedIn photo, but you can use a photo found in X-Ray LinkedIn as the starting point for a productive image search. This link has full instructions

<https://docs.google.com/document/d/1-74N4qwH71ffdvgDQhDDyGCN9vh9AZt4w1RbD4b6Rm8/edit>

How to Generate Emails

When the email generator does not return a result for the executive's current position, the next step is to try the first two or three Board Membership urls. Here's how....

1. Press on the company edit button of the Titan's Board Membership experience section

2. The Board Membership company page will open in the new tab. Copy the part of the url following www. (if the url is not present, it is not your responsibility to complete it. You can safely move on to the next Board Membership company)

3. Return to the profile page and press 'Generate' in the email section as you normally would. Next paste the url segment in the Email domain box and press 'Reset All'. If this works, you have your email. If not, please try one or two more current Board Memberships if present.

