Hockeystick

ON-DEMAND TRAINING

Getting Started Transcript

Welcome to this demonstration of Hockeystick.

Here at Hockeystick, we offer a cloud-based product that automates the reporting lifecycle. With Hockeystick, funds can access richer data, better analyze portfolio companies and avoid designing complex spreadsheets or copying and pasting quarterly data into Excel.

Our product is available for a free trial and I encourage you to sign up for one after this demonstration.

Let's get started.

Portfolios Page

Here, we are looking at the Portfolios Page and start screen. This page visualizes a fund's data, as Hockeystick automatically turns financial data into visual reports through the dashboard and chart widgets. Like the rest of Hockeystick, this page offers a lot of flexibility.

Here, we can also change what widgets are displayed and import data from multiple sources and integrations, such as Salesforce, Dynamics, or manually via CSV.

Templates Page

How does a fund collect company data on Hockeystick? The first step is to add or create a report.

To do this we need to navigate to the Templates Page.

There are two ways to set-up a Hockeystick report. We can use a report from our library or we can create a new template from scratch.

We can add qualitative and quantitative fields to our report template as well. For example, we can include financial metrics like revenue, expenses and burn rate, as well as key performance indicators such as headcount, turnover etc.

Here's an example of a report template and as you can see, it can be easily rearranged. Report designs can also be personalized and branded, and we can even set up custom reporting schedules and reminder emails to communicate with portfolio companies.

Once we set up our template, we can specify how frequently this report goes out and give it a due date.

Company Invites

We now have a report template. Next, we have to invite portfolio companies onto Hockeystick to file this report.

To do this we need to navigate to the Companies tab, click Add a Company and fill out the required fields.

The email address we invited will receive an e-invite asking them to sign up for Hockeystick. It will take them 20 seconds to sign up and then they'll be able to start filing reports!

We will also receive an email notification once the invite has been accepted.

When a company joins it will appear on the Company's page.

Company's Page

In the Company's page, we can see all the companies that we're receiving reporting information from. As you can tell, Hockeystick shows if a company has filed their latest report or not.

Reports Page

Once companies start filing reports it gets pushed into this inbox. We will also receive an email notification after a company has filed.

Fund View

Funds have the ability to view their portfolio companies accounts on Hockeystick.

It's in this view that we can see Custom Fields about our portfolio companies.

What's a Custom Field? They are a tool that allows us to store information about a Company outside of the defaults provided by Hockeystick. They include date of first investment, pre-money valuation, type of security, board seat, investment notes, industry sector, stage and more.

You can add more Custom Fields or create your own in Settings.

In this view, we can also update company specific documents and house all investment information in one place. We can upload their cap table, shareholder agreement, subscription agreements and so on. We can also specify if we want these documents to be shared with the company or not.

Let's dive deeper into a company's account.

Company View

For this presentation, we're also going to view a company's account from the company's perspective.

As you can see, the start screen for a company is their Reports Page. It's here that they can see if they have published all of their reports, or if any are outstanding.

To fill out a report, all companies have to do is click on the blue edit button. Once they've filled the required information and hit publish, we as the fund will receive a notification and both accounts will be automatically updated.

To make reporting as easy as possible, Hockeystick has a feature that allows companies to automatically fill a current report with previous reporting information.

My Company Page

This is the My Company page.

It's here that companies can update their dates, view their reports, integrate with their QuickBooks Online account, add funding details and documents such as cap tables, balance sheets and more.

This is also where companies can access their permissions matrix—a tool that allows them to decide which investors can access their reports.

Company People Page

This is the People Page. Just like Funds, this is where companies can add and remove users. There are 4 different roles on Hockeystick: primary owner, owner, admin and member. To set boundaries and keep data secure, only primary owners and admins can change someone's role.

To add a new user, click on the add a user button on the right-hand side of the screen, fill out the required information and click invite Users. That person will receive an invitation email to Hockeystick. They will be asked to create an account (for free) and then will be given access to the company page.

This process is identical on the fund side.

Report Export

Now that we have company data on Hockeystick, we want to think about how we can export it. Reports can be exported in a number of ways, but the most effective way is to click the Export CSV button. Exported reports are up-to-date, secure, and viewable by web browser or on a mobile device.

Hockeystick CSV files look like this.

Hockeystick will automatically pull everything from our reports into Excel. Every portfolio company has a tab that breaks down reporting data over months, quarters etc.

Keep in mind that Hockeystick can customize the export to be organized to our liking.

Conclusion

You've seen a lot in the last 10 minutes.

We did a deep dive into a Hockeystick fund account and then explored a company account. Highlighting key product features and integrations along the way.

As you can see, our customers understand the value of implementing a disciplined, systematic approach to data. It reduces the time and cost of getting investee company data and reporting on it.

More than 10,000 private companies use the Hockeystick platform.

Over 3,500 individual investors are using Hockeystick to gather data.

More than 70 large funds and funding bodies are on the system.

Now it's your turn.

You can use our full feature trial software with your own data and your own environment for a self-reliant evaluation to validate that Hockeystick will save you time and allow you to access data in ways you were never able to before.

Thank you for joining me for this demo.