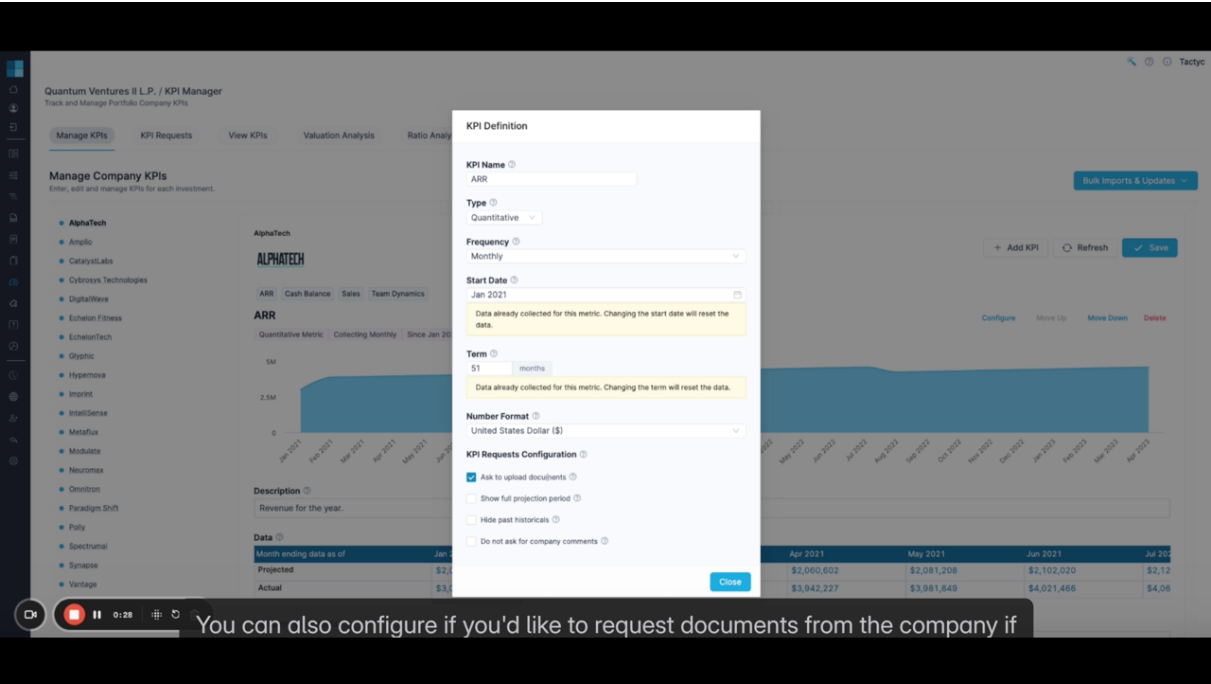


KPI Manager Walkthrough (Sanitized for Notion)

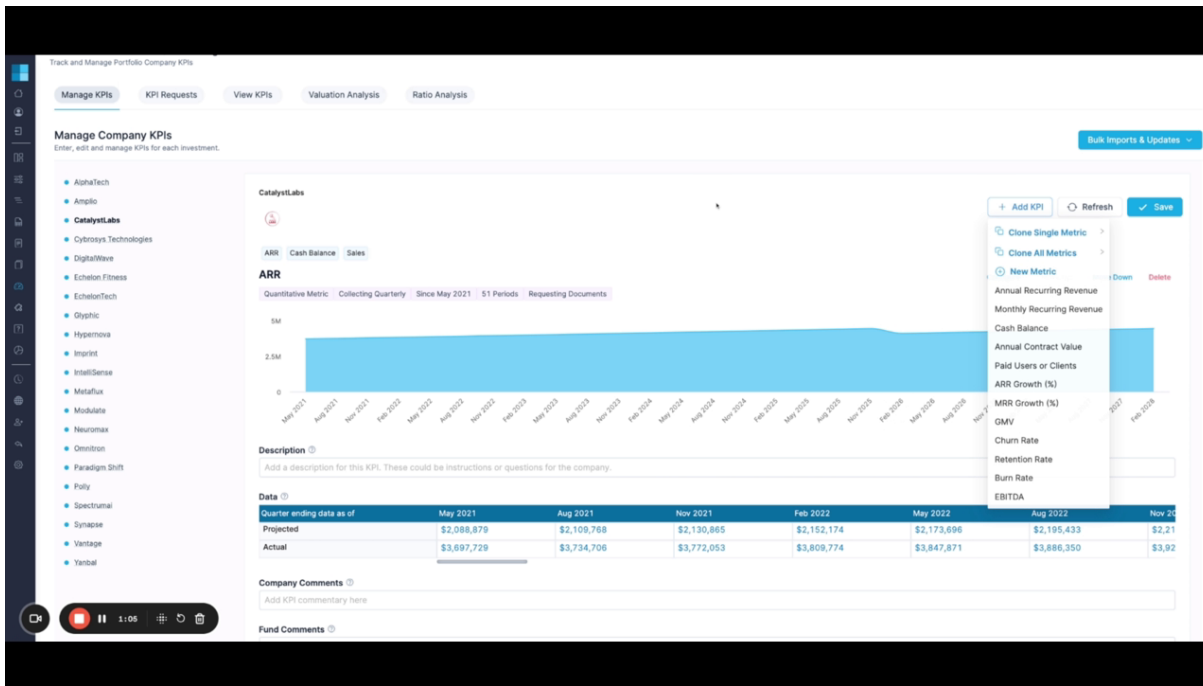
KPI Overview

KPIs are operating metrics typically tracked to monitor a portfolio company's performance. These could include Revenue, Cash Balances, or Customers.



How to Add a KPI

From the Notion sidebar, navigate to the KPI Manager. Select a portfolio company, click 'Add KPI', and either select a predefined metric or create a new one. You can customize the frequency, data type, range, and even upload supporting documentation.



Adding KPI Data and Assigning Contacts

You can manually input KPI data via Notion Pages, or assign portfolio companies to enter the data themselves by assigning a contact email. Contact details can also be imported from Notion.

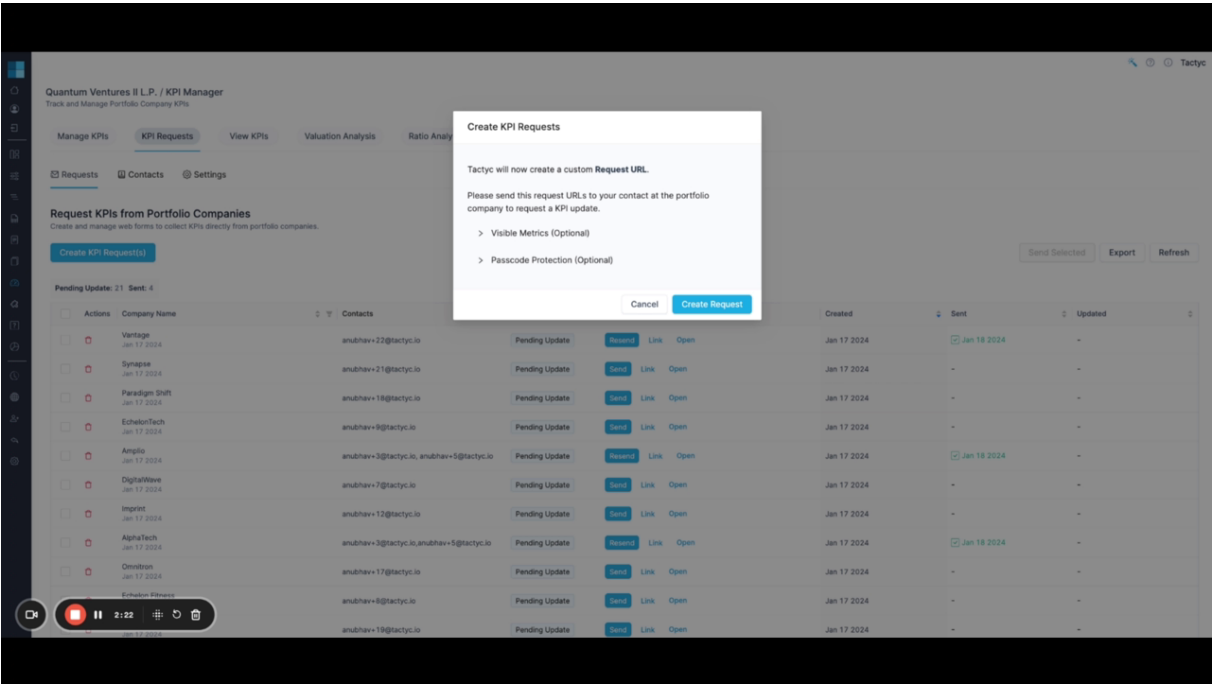
The screenshot shows the 'Manage Company KPIs' interface for Quantum Ventures II L.P. / KPI Manager. The table lists KPIs for various investments, including AlphaTech, Amplo, CatalysLabs, Cytrosys Technologies, Echelon Fitness, EchelonTech, Glyphic, Hypernova, Imprint, IntelliSense, Metaflux, Modulate, Neutromax, Omnitron, Paradigm Shift, Polly, Spectral, Synapse, Vantage, and Yambal. The table columns include Investment, Metric, Description, Type, Reporting Type, Format, Start Date, Request Documents, Hide Prior Historicals, Request Projections, and Hide Comments.

Investment	Metric	Description	Type	Reporting Type	Format	Start Date	Request Documents	Hide Prior Historicals	Request Projections	Hide Comments
AlphaTech	ARR	Revenue for the year.	Quantitative	Monthly	United States Dollar (\$)	Jan 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AlphaTech	Cash Balance	Cash balance.	Quantitative	Quarterly	United States Dollar (\$)	Jan 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AlphaTech	Sales		Quantitative	Quarterly	United States Dollar (\$)	Jan 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AlphaTech	Team Dynamics	Please tell us about your current team comp	Qualitative	Quarterly	United States Dollar (\$)	May 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amplo	ARR		Quantitative	Quarterly	United States Dollar (\$)	Mar 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amplo	Cash balance		Quantitative	Quarterly	United States Dollar (\$)	Mar 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amplo	Sales		Quantitative	Quarterly	United States Dollar (\$)	Feb 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CatalysLabs	ARR		Quantitative	Quarterly	United States Dollar (\$)	May 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CatalysLabs	Cash Balance		Quantitative	Quarterly	United States Dollar (\$)	Nov 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CatalysLabs	Sales		Quantitative	Quarterly	United States Dollar (\$)	Aug 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cytrosys Technologies	ARR		Quantitative	Quarterly	United States Dollar (\$)	Feb 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cytrosys	Cash Balance		Quantitative	Quarterly	United States Dollar (\$)	Feb 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Creating and Sending KPI Request Forms

Request forms are created in the KPI Manager. Select reporting periods, choose whether the form applies to all or specific companies, and optionally secure the form with a passcode. You can send

these forms automatically or manually by copying the link.



Reviewing Submitted KPIs

Once a portfolio company submits their data, you'll receive a notification. Log in to review, compare against previous values, and choose to approve or reject the updates. You can also enable auto-approval in settings.

