



BRAND MANUAL

Tagline options:

PortMonster

Let us organize your unorganized data

PortMonster

This is a monster you want in your life

PortMonster

Data is like a mirror. It needs to be clean to work!

PortMonster

Portfolio monitoring, simplified.

Brand Messaging

Brand Purpose/ Promise	We are passionate about organizing unorganized data.
Vision	Our vision is to support investment firms to perform better through seamless, efficient and error-free portfolio monitoring.
Mission	Unleash the power of clever data management.
Values	<ol style="list-style-type: none">1. Smart data management PortMonster excels in smart data collection and mapping. We believe the backbone to success is in managing data the right way. Your excel sheets will be digitized in seconds.2. Unified platform for all your portfolio data Robust data extraction features and cloud storage negates the risk of losing critical portfolio related data, increasing the quality of portfolio monitoring, no matter how large.3. Leave the grunt work to PortMonster

	You now have the flexibility to view industry level portfolio performance, with no burden of reporting on the investee. Allowing businesses perform better.
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Voice and Tone

Voice characteristic	Description	Do	Don't
Intelligent	Expert, matter of fact, organized, clever	Express yourself, use direct messaging, take a very frill-free approach to communication backed by sharp data.	Do not use too much slang, jargon. Don't use superlatives and overpromise.
Passionate	Enthusiastic, heartfelt, zealous	Strong messaging/ verbs, emotionally intelligent language, see the results and meaning behind effective data management.	Do not sound too indulgent or emotional. Avoid sappy language. Don't be lukewarm, use passive voice or be wishy- washy.
Witty (Secondary characteristic)	Tongue-in-cheek, funny, smart, ahead of the curve	Be funny, use metaphors and puns. Only positive comparisons and reinforcement.	Don't use ideas or representations that clash and lose focus of the core message. Do not be overconfident, arrogant, use obscure references and overplayed examples.
Intuitive	Easy, respectful, inviting, proactive	Read between the lines, answer questions that may not be asked but are vital.	Do not say anything that is confusing as a brand or to the user or that sounds too casual. Do not spoon feed but fill product gaps before they are pointed out.

Visual Language

Colour palette:



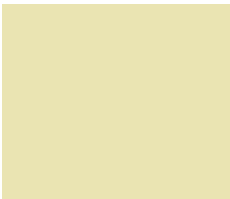
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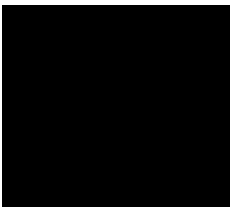
#f3bd0d



#003049



#eae2b7



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Typography:

We should use 2 fonts: 1 for headings/ banners and so on (Merriweather).

One of the other two (Open Sans and Nutino Sans) for body/ long copy. Do let me know which of them you prefer.

Merriweather: Data is like a mirror. If you keep it clean, it will help you look within and reflect.

Open Sans: Data is like a mirror. If you keep it clean, it will help you look within and reflect.

or

Nutino Sans: Data is like a mirror. If you keep it clean, it will help you look within and reflect.

Logo:

Yes, lets use both - allows variation when designing creatives.

Placement and positioning:

To ensure eligibility 1 cm of clear space should be kept all around the logo. It isolates the mark from any competing graphic elements that might conflict with, overcrowd and lessen the impact of the mark.

TA Profile

- VC firms with > 15 portfolio companies
- VC firms that are actively investing in companies

User Personas

User 1: Primary User and Buyer

- Demographic: Age: 35 - 45 years
Sex: M
Income: 40 - 60 LPA
Status: Married
Location: Tier 1 cities, India

- Role” VP/CFO/Financial Controller
- User 1 is the decision maker. The consumers of PortMonster output; for instance, they will review, give final feedback on the reports generated on PortMonster and once finalised share it with the board.
- Issues (pre-PortMonster): Unorganized data, received delayed reports, reduced bandwidth, rushed deadlines, no assurance accuracy of reports.

User 2: Primary User

- Demographic: Age: <30 years
Sex: M/F
Income: 10 LPA
Status: Unmarried
Location: Tier 1 cities, India
- Role: Entry level associate/ analyst
- They input / upload the data received from the portfolio companies onto PortMonster, create reports for review by the CFOs (first user persona).
- Issues (pre-PortMonster): Having to deal with multiple excel versions from portfolio companies (work overload). Human error in uploading data and reporting, delays in producing results, time crunch leading to substandard output.

User 3: Secondary User

- Demographic: Age: 35-45 years
Sex: M/F
Income: 50 + LPA
Status: Married
Location: Tier 1 cities, India
- Investment Team
- User 3's analysis requirements are independent of User 1's. Usually User 1 does not prepare reports for User 3's consumption. User 3 only sparingly uses User 1's inputs on certain core finance matters.
Based on the performance analysis of a portfolio company, they can decide whether to invest, exit etc from the company.
- Issues (pre-PortMonster): Inability to access info quickly (since data is spread over multiple excel sheets), possible judgement and analysis gaps due to inflow of high volume data from portfolio companies.

