Data Pitch

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D5.2 Experiments Oversight Tools

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Table of Contents

Executive summary

The purpose of the experiments oversight tools is to act as an initial guide to what tools will be used throughout the accelerator programme and how they will be used by the different stakeholders.

SME: For the SME´s it will be the form on which they will record and report their progress to the advisors enabling them to flag risks early as well as report on wins.

Advisors: For the Advisors it will be the main reporting tool that will record the meetings, insights, doubts and personal perspective on the progress, commitment and investment of the SME working towards successful completion of their set out milestones.

Consortium: The consortium will have access to these documents for review, enabling the possibility to submit feedback and suggestions to the advisors. The Advisors will decide at their own discretion whether to communicate the input back to the startup and in what format or context.

<u>Tracks</u>
Throughout the accelerator programme each SME is recommended to provide two parallel tracks of activity. Only in specific cases where one of the tracks does not align with a certain milestone, might one of the tracks be paused. This is usually the case when during a specific period, until the end of a milestone, the SME focuses all the resources to develop the solution, or when the solution is ready and all resources are focused on getting more business. However, throughout the timeline of the accelerator program both tracks have to be accounted for.

Business track - this track includes the activities, KPIs and milestones that need to be achieved on the business side of the SME operations, such as: lead generation, scaling, internal processes, founder negotiations, funding, hiring, etc.

Technology track - this track includes the activities, KPIs and milestones that need to be achieved on the technology side of the SME operations, such as: product development (hardware and/or software), algorithms and models improvements, setup of servers, etc.

Even though there will be no clear distinction in the tools/fields to monitor for these tracks, the Advisors have to always keep both in mind during the Advisor meetings.

Abbreviations and Definitions

VC - Video Conferencing

EU - European Union

H2020 - Horizon 2020 European Research and Innovation programme

ODI - Open Data Institute

ODINE - Open Data Incubator for Europe

SME - Small and Medium-sized Enterprises

SOTON - University of Southampton

Introduction

The purpose of the experiments oversight tools deliverable is to outline the process of monitoring the progress of the startups and how the advisors together with the SMEs can keep track of the journey towards fulfilling the milestones set out in their work plans. This document is the first deliverable on experiments oversight tools and is written before the start of the first accelerator programme. This deliverable will contain the original plan and ideas for the accelerator program. The plan will be revised at the end of the first programme and may be amended for the second round based on the feedback.

1. Tools

1.1 Airtable

Airtable is a simple free of charge add-on to google docs. It is similar to Google sheets but provides a more visual and presentable way to show and work with the information. It provides colour-based fields, strict fields for specific formats like date, time, text, checkbox, lists and more.

There are many tools that could be used, however some of the main reasons why Airtable was chosen as the main tool for monitoring progress are:
  · ease of use and the visual simplicity.
  · accessibility from Google Drive
  · import / export data functionality for reports.
  · Worksheet format enables the centralization of all activities and information needed during the status meetings with the SMEs

1.2 Mentornity

Mentornity is an online tool that enables an easy way to search, select and book mentor meetings with experts from a list of mentors. It also provides a communication tool between mentors and mentees, tracking and evaluation of the meetings.

All mentors bios and skills will be listed in a mentornity tool which will be used throughout the programme. The mentors will be asked to provide an image, a bio as well as a list of key skills that they can help with. The database of mentors will be visible to all companies and can be filtered based on specific skills. Companies can then find and contact mentors on an ad hoc basis depending on their needs. Any interactions with mentors will be scheduled by the company and the mentors directly. Data Pitch will suggest mentors for companies but will not participate in the matchmaking process.

2. User Guide

This section acts as a users manual for the above mentioned tools.

2.1 AirTable

"***DataPitch cohort 1 - SME Progress***" AirTable will be used for documenting and monitoring the progress of the SME´s throughout the acceleration program.
The Advisors hold the responsibility for ensuring that all information in the AirTable document are up-to date at all times.

This document includes the following Tabs:
- Companies,
- Advisor Meetings,
- Team Briefings,
- Accelerator Programme Agenda,
- Milestone Review and
- Challenges.

2.1.1 **Companies**

This contains the list of SMEs that were selected for the accelerator programme. It includes necessary information needed for a quick view such as: Name, Contact Person, Contact Details, Advisor Allocated and more.

2.1.2 **Advisor Meetings**

This is the main tab that will be used by the Advisors to input comments about the meetings and progress of each SME.
The document has multiple option views.
- **Meeting Log** - the main view that will be used to enter comments and feedback during and after each Advisor meeting.
  The main fields that will be updated are:
  - **Progress** - flag whether the SME is: OnTrack, At Risk, Running Slow or Over Achieving.
  - **Next Meeting** - input the date booked for the following Advisor meeting
  - **Date X** (X is the meeting number in sequence) - the date of the actual meeting that took place - to be filled at the end of each advisor meeting.
  - **Comments** X (X is the meeting number in sequence) - the comments about the meeting to be inserted during the meeting noting main points discussed and outcomes.
  - **Needs / Actions** X (X is the meeting number in sequence) - (optional) to fill in only if there is an action required by the Advisor or the SME. Most common inputs are:
    - agreed KPIs/Actions that need to be achieved by the SME to ensure they stay on track.
    - action for the Advisor like clarifications or introductions to key mentors.
- **Next Meeting Calendar** - a calendar view with the list of next meetings as inserted in the Next meeting field.

2.1.3 **Team Briefings**

This tab will be used to record key points mentioned during the Team Briefings. It contains only 2 fields Date and Comments for each meeting.

2.1.4 **Acceleration Agenda**

This tab includes the list of events happening throughout the acceleration program, categorized as one of the following:
- Main Event
- Workshop
- Team Briefing
- Founder Story

It contains 2 views, the regular list view and a calendar view.

2.1.5 **Milestone Review**

This sheet will be used to record the notes and decisions of the Advisor during a Milestone review. This includes all the fields agreed on in the Work Plan as well as indication of the results and reasons why the SME succeeded or failed in achieving the set out milestones.

Main fields that will be populated during and after a milestone review are:
- Review Result - with a binary result **Passed or Failed**
- Review Comments - the main points discussed during the review. Note that this is not meant to be used a meeting annotation tool but as a bulleted key point guide to refer to when needed.

2.1.6 **Challenges**

A list of challenges that were published on the Datapitch call. Used as a quick reminder of the challenges that the SMEs are resolving.

2.2 Mentornity

Mentornity has a user friendly interface with no need for specific manual but it is worth to mention the main features such as:
- Advisor can send invitations to mentors and mentees via email.
- Users complete their profiles by the roles whether it is a mentor or a mentee
- Mentors add available times and meeting locations (or preferred VC tool)
- Mentees search and book meeting with the mentors.
- Mentors and mentees can take notes and ask questions to each before and after the meetings.
- Advisor can view the meetings through a feed. Enabling the Advisors to discuss the mentoring sessions during the Advisors meetings.
- All feedback from mentors and mentees can be viewed by the Advisors. A personalised questionnaire is sent to each mentor and mentees post meeting.

7. Conclusion

This document is to be used as a guide and as a living document. The deliverable experiments oversight tools is designed to act as a brief user's manual to ensure that all users are aware of the purpose and the proper usage of the tools.

More fields and sheets might be added, updated or removed to the AirTable throughout the first accelerator programme as needed to ensure a centralised platform for monitorisation and actions related to the progress of the SMEs.

This document will also be revisited and revised as the first accelerator programme comes to a close and feedback has been provided.

References

- DataPitch cohort 1 - SME Progress - AirTable
  https://drive.google.com/open?id=1hvlJKuE4uvIg46jYVXLVWfmCfXaU2cUm
- https://mentornity.com/