Overview – IMMERSE Interterm

The theme for this second "Interterm" is IMMERSE. The goal in the design and selection of the experiences you will see on the following pages is to provide you with the opportunity to put into practice your learning and experiences while helping a company with a real, live challenge or opportunity. Additionally, these experiences provide a channel for adding knowledge and exposure to an area that aligns with your concentration, functional area or industry of interest. This should be a great kickoff towards your summer internships.

This document serves as a syllabus of sorts. In it you will find information on what to expect, expectations of you, both from the school and the companies, as well as course requirements. It is important that you be familiar with this information. The information is sectioned out as follows:

- What This Interterm Week Will "Typically" Look Like
- Important Expectations
- Course Credit Details
- Travel Expense Reimbursement (for those courses requiring travel)
- Course Listing with Descriptions

Questions? Feel free to reach out to Alice Obermiller, Assoc. Dir for Experiential Learning (aobermil@nd.edu).

What This Interterm Week Will "Typically" Look Like

While each experience is different in scope of what students will work on during the week, most will follow a similar format that looks something like this:

- **Day 1 (Monday) – Foundation / Expectation Setting + Organizing / Starting the Work**

  Kicking off in the morning, the provider will set the landscape on who they are, what they do, background on their industry as appropriate, introduction of staff that will be involved, and an overview of their business challenge or opportunity (the reason you're there).

  From there, expectations for the week are set, and the work begins. If you're operating on a team, typically the group will organize around a process for scoping out the work, as well as documenting initial questions that start to emerge.

  The day usually concludes with a check-in with the provider on how things are shaping up, as well as the opportunity to ask questions, a critical component of the process.

- **Days 2 (Tuesday) and 3 (Wednesday) – Work and Provider Check-ins**

  Depending on the work, these two days are spent in the flow of a typical client engagement:

  o Deep dive into the problem/opportunity through research and analysis.
  o Checking-in with the client to ask questions, gather additional data and guidance.
  o Mapping out recommendations with implementation and measurement strategies.
  o Documenting the final deliverable that will be left with the provider on Thursday.

NDINTERTERM

The check-ins with the provider are key to ensuring your final deliverable will meet their expectations, and that you are going deep enough into the issue and not heading down dead-end paths. These check-ins also serve as mile markers for you to work towards.

- **Day 4 (Thursday) – Final Presentation/Deliverable to the Provider + Debrief**

On this last day, you present your final deliverable to the provider through a final presentation and/or report. The outline for this deliverable, at a minimum, should include the following:

1. **Problem Identification** -- Brief restatement of the problem or opportunity in your own words based on what you learned in the process.

2. **Research and Analysis** -- Overview of the methods and data you used for researching and analyzing, including conceptual frameworks and models applied.

3. **Recommendations** -- Final recommendations based on the two points above along with evidence as to why you settled on these as the best recommendations.

4. **Thoughts on Implementation Strategy with Measurements** -- Notation on how those recommendations might be implemented, including potential timeline and standards for how success would be measured.

It's not unusual for providers to invite other staff, including senior managers, and sometimes clients into the final presentations. Be prepared for this possibility.

The conclusion of this last day will culminate in a debrief between the organization and the students on how the week went, including feedback and completion of the Student Evaluation, which they will give to each student, with a copy to Alice Obermiller.

Each provider will lay out the week as it supports the needs of the project as well as their schedules. The daily outline above should serve as a foundation, but providers may change the flow or what they require based on the work. As an example, some will include site visits, meetings with clients, factory observations, etc., to help you 'immerse' into their business.

Important Expectations

- The company will let you know details like start time on Monday, location, dress code, etc., in an introductory email they will send prior to Interterm week.

- Some providers will send along pre-reading to help you become familiar with their business or the issue prior to your arrival. Typically, it's information that you can easily absorb a day or two before you start.

- Most providers will require you to sign a Non-Disclosure Agreement, or Statement of Intellectual Property Rights. In order to enjoy the learning that comes from a 'live' problem, providers want to share confidential internal company/client information to allow you a thorough and real experience. You will generally sign that first when you arrive on Monday.

Overview & Expectations

NDINTERTERM

- When researching information or looking for data during the project, it is expected that you go beyond just using the Google search engine. Check in with the Mahaffey Library at any time if you are looking for resources. Most can be accessed off campus.

- Providers expect four full days of work, meaning that Thursday will end based on their schedules. Some may want to specifically conclude by mid-day, others may have the final presentation mid-afternoon. In all cases, you should expect to conclude on Thursday no earlier than 4:30-5:00pm. If your opportunity requires you to travel, base your travel arrangements on this concluding time.

- Finally, while providers know that you're an MBA, they also recognize you as a business professional. As a representative of Notre Dame and Mendoza, we expect nothing less than your best and brightest effort for these companies.

Course Credit Details

- Each course is 1 credit, and you may only register for one course per "Interterm" session.

- You must participate in the full Monday–Thursday schedule to receive credit.

- Providers will complete a Student Evaluation at the conclusion of the work that will be used in assigning the *satisfactory/unsatisfactory* grade for the course. A grade of *satisfactory* is required to receive the full 1 credit. These Evaluations will be submitted to Alice Obermiller for purposes of assigning the final grade.

- Course providers have high expectations in standards of professional behavior and deliverables. Feedback on students from providers to the contrary may result in an *unsatisfactory* grade.

Overview & Expectations

NDINTERTERM

Travel Expense Reimbursement

We're excited to offer a number of Interterm opportunities located beyond the campus and city of South Bend to develop and enhance your portfolio of learning experiences while at Mendoza. This document outlines what you need to know about expenses and expense reimbursement. **This is mandatory reading for any Interterm course requiring travel.**

Expense Limits

Expenses for Interterm opportunities requiring travel has a cap of $1,000 per student (transportation, lodging, and meals). While full trip documentation, including expenses must be fully documented (see below), **if the total expense request exceeds the capped amount, the expense report will be approved at $1000.**

Most opportunities requiring travel will comfortably fall under this cap, and students are expected to follow the University policies on spending limits. Some opportunities because of their location will have an amended increase in the cap to ensure students are not limited by the expense. Students registered for those opportunities will be notified of their amended cap. In all cases, we encourage the use of Airbnb or other shared lodging arrangements, as well as ride-sharing to manage cost where appropriate.

Expense Policies

The University requires full trip documentation for auditing purposes. Each expense report will require the following:

❑ Signed Student Travel Certification form (a sample copy shared directly after this section). This form must be filled out by the student, and then sent to Alice Obermiller for signature before uploading to the expense report. **Reports will be returned if they do not include this form.**

❑ Full-trip documentation – each leg of the trip <u>must</u> be accounted for either by receipt or comment in the header of the report. For example:

  o *You stay at a family member's house at no cost to you.*
  o *You stay in a hotel room in which another student incurred the expense.*

You must indicate on your expense report when, where and with whom you stayed. Each leg of the trip must be accounted for from doorstep to doorstep as well as the return.

❑ The University will not reimburse the leg of travel to alternate locations after Interterm week.

If you are not returning to South Bend directly after Interterm (due to Spring Break), you must obtain a quote for the cost of a return flight to South Bend from your assigned destination and attach it to your report with a comment explaining your travel plans. This is the amount for which you will be reimbursed for your return flight (not to exceed the $1,000 allotment).

For example, if your opportunity is in New York and you choose to fly home directly to Denver for Spring Break before returning to school, you must document what it would cost to return to South Bend from New York for reimbursement.

Travel Information

ND**INTERTERM**

❑ If you must share an expense, please divide the expense where each individual has their own receipt, or elect one person to claim the expense. For example:

  o *You are sharing a hotel room or an Uber.*

Please have the vendor divide the bill among guests or have one person submit for reimbursement. All receipts should be itemized with totals matching claim amounts. Any agreements made between students to settle charges are the responsibility of said students.

Please note that alcohol is not a reimbursable expense. It must be deducted from the total receipt in the case of meals.

Expense Reporting

Travel expense requests must be processed through the University's expense website at https://travel.nd.edu. Expense reports should be logged within 60 days of the travel date. Processing can take up to 15 business days.

Expense reporting procedures are available at:
https://travel.nd.edu/assets/235943/add_expenses_and_submitting_reports_guide.pdf

**Commonly Used FOAP Expense Account Numbers**
      77010 - Airfare (domestic)
      77050 - Lodging (domestic)
      77060 - Meals (domestic)
      77030 - Ground transportation (domestic)
      77020 - Conference fees (domestic)

Under the "DETAILS" tab in the expense report, please add Jennifer Ransbottom as approver and submit expense report.

Expense Reimbursement

How do I pick up my reimbursement?

Reimbursement depends on how the requestor's account is set up. Options include direct deposit or a check. If the student does not have direct deposit they will be notified by phone or email by Accounts Payable or GBP Student Services when the check is ready. The student will need to present an ID at 725 Grace Hall to receive their check. To set up a direct deposit, use the app on InsideND.
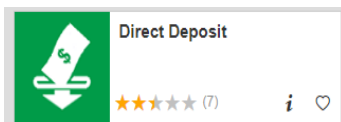
For more information on Student Travel and Tax Implications.

Questions on Travel?
Please contact Jennifer Ransbottom at jransbot@nd.edu.

Travel Information

NDINTERTERM

University of Notre Dame
Student Business Travel Certification Form

DO NOT COMPLETE THIS FORM FOR NON-TRAVEL REIMBURSEMENTS

A completed Student Business Travel Certification Form must be submitted with a travel expense report when requesting reimbursement to a student for University business travel in order for the payment to be made on a tax-free basis under the University's Accountable Plan rules. Similar to the method used for attaching other receipts, this form should be scanned and attached to the student's travel and expense report filed through travelND.

Name of Student _____

NDID or NetID_____

Location and Dates of Travel: _____

I certify that these expenses (check all that apply):

_____Directly supports a faculty member's project or research program, or;

_____Are related to presenting or leading a session at a conference (a photocopy of the conference program is attached), or;

_____Are incurred while officially representing the University

Note: The detailed business purpose for student travel must be described on the Travel and Expense Report that this Certification Form is attached to.

If none of the above criteria are met, this form should not be completed and the reimbursement will be classified as a fellowship/scholarship/award (FSA).   The payment of FSA may represent taxable income to the student (please give the student a copy of the University's FSA letter) and may be subject to withholding and reporting if paid to an international student.

_____   _____

Signature -Faculty member   Date
University of Notre Dame

ND**INTERTERM**

IMMERSION EXPERIENCES

SPRING 2019 COURSES

The pages ahead describe the IMMERSE "Interterm" courses for **Spring 2019** that are open to **MBA20s**.

PARTNER	PROJECT	LOCATION
1. **Bank of America**	Branded Credit Cards in the Age of Online Banking	Hudson, OH
2. **Blindlight**	Increase Traction With 'Shatoetry' Application	West Hollywood, CA
3. **Colada Shop**	Helping Fast Casual Cuban Concept Increase Traction	Sterling, VA
4. **G2Crowd**	B2B Software Industry Review & Marketplace Industry Benchmarking Analysis	Chicago, IL
5. **GlyphEd**	M&A Assessment for University Enrollment Management Software	Alexandria, VA
6. **Graham Allen Partners** (3 projects)	Identifying Acquisition Targets Designing a Mentorship Program Policies and Management of Remote Work	South Bend, IN South Bend, IN South Bend, IN
7. **Heartland Ventures**	Silicon Valley Tech to the Advanced Manufacturing Industry	South Bend, IN
8. **HUNGRY**	Growing Customer Accounts By Creating a Premium Chef-connected Experience	Arlington, VA
9. **Old National Bank**	Market Analysis for Key Initiatives	Evansville, IN
10. **Steel Warehouse** (2 projects)	Inventory Management (operations) Packaging Analysis (operations)	South Bend, IN South Bend, IN
11. **SwipeSense**	Modeling A Fast-growing Business Over 3-5 Years	Chicago, IL
12. **TriStar Health Partners**	Third Round Funding & Due Diligence	Nashville, TN
13. **Voices.com**	Understanding The Buyer Journey For Voiceover Talent	Mendoza/Notre Dame, IN

BRANDED CREDIT CARDS IN THE AGE OF ONLINE BANKING
Bank of America (Hudson, OH)
Jake Frego, Senior Vice President, Co-Brand/Affinity Marketing
(M-Th, 8:30 a.m.-4:30 p.m.) / Max. 3 students

[Bank of America](#) has been the "Official Credit Card Issuer of Major League Baseball" since 1997. Together, the two organizations have generated a sizeable business, utilizing marketing channels such as direct mail, event promotions, and digital.

Project Opportunity:
Marketing methods have changed dramatically over 20+ years, as have customer expectations. When BOA first launched the MLB credit card in 1997, affixing an MLB club logo on a credit card was sufficient to get baseball fans to apply for and use an MLB credit card.

Today's consumer, however, expects more value from a credit card to make it the card of their choice. With e-commerce, mobile wallets, and online payments, many cardholders don't even take their card out of their wallets. Logos on credit cards may not matter anymore.

The specific challenge for this project will be: We would like to take a fresh look, provided through the eyes of ND MBA's, on our marketing methods. Are the marketing channels we currently deploy relevant? Do our marketing methods resonate with today's consumer? How do other companies which sponsor sports continue to deliver a positive ROI for their shareholders? Simply put, has the bank positioned its MLB relationship for success over the next 20 years?

Students who enroll in this course will:
- Gain experience working with transitioning product lines in the retail banking industry.
- Use marketing expertise to deepen understanding of how companies and sports properties leverage marketing assets.
- Interact with internal and external clients.
- Exercise innovation and creativity by recommending enhancements and changes to an existing product.
- Gain exposure to the inner workings of a business unit inside a national bank.

Prerequisites:
This opportunity is focused specifically on sports marketing, therefore, it is expected that participating students have a career desire to combine sports and business. Students on this project are expected to:
- Have marketing experience, with exposure to storytelling through marketing.
- Act independently while being flexible.
- Collaborate, and demonstrate project management and organizational abilities.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Hudson, Ohio, approximately 4 hour drive from South Bend. Students should drive to this location as a car will be necessary to get around for the week.

Immersion Experiences

NDINTERTERM

Immersion Experiences

INCREASE TRACTION WITH 'SHATOETRY' APPLICATION
Blindlight (West Hollywood, CA)
Lev Chapelsky, General Manager (ND '86)
Bo Crutcher, Senior Producer
Tommy Callahan, Producer
Kristine Hemady, Business Management Associate
(M-Th, *daily times TBD*) / Max. 4 students

Blindlight is a Hollywood-based company operating in the nexus of the intersection of Hollywood and the videogame industry. Blindlight's principal business is in providing Hollywood-based production services for the world's leading videogame makers. Its core service disciplines include the production of voicework for games, certain motion capture services, interactive story development and scriptwriting, and celebrity acquisition for games.

Since its founding in 2000, Blindlight has earned over 500 game credits, hired over 300 celebrities for games, and amassed a client list that includes all 20 of the top 20 most renowned game companies around the globe. Blindlight continues to work as part of the extended development teams on original game properties including the HALO, SPLINTER CELL, FAR CRY, ELDER SCROLLS, DISHONORED, FALLOUT, TOMB RAIDER, GUILD WARS, and DESTINY franchises, as well as on dozens of film and TV licensed properties.

As an adjunct venture to its principal service business, in 2013 Blindlight ventured into original IP creation with the production of the official app for William Shatner -- Shatoetry. This award-winning app is still available today on the Apple App Store and on Google Play. As 2019 kicked off, William Shatner reached out to us requesting that we make prompt efforts to revitalize the app (in his words: how can we "popularize" and "sensationalize" it). That will be the focus of this project.

Background on the Opportunity/Challenge:
Blindlight needs help serving one of their most premier customers, William Shatner, who has created an application for fans and enthusiasts called www.shatoetry.com. William Shatner's team is looking for recommendations from Blindlight on how they can increase awareness, interest, and revenue from the application that's been on the market for some time now. This project will require a deep dive on the application functionality and reviews in order to better understand what users most appreciate about the app experience. Ultimately, they're looking for recommendations on how to take the application to the next level based on industry best practices and success stories. Their key performance indicators are downloads, active users, and paid subscribers. Although their goal is to increase traction with all three, they're operating with an extremely lean budget and need to execute for their client without drastically changing the app or allocating money towards a formal marketing budget.

 Students who enroll in this course will:
- Attack a manageable short-term assignment, i.e. recommending strategies for revitalizing interest in, and revenue from, the William Shatner app.
- Be on-site in a dynamic entrepreneurial startup, with full exposure to this successful entertainment-services pioneer uniquely positioned in the intersection between the Hollywood and videogame industries.

Prerequisites:
This project is suitable for all MBA students, but especially applicable to students with:
- MBA concentrations in entrepreneurial strategy and/or marketing

NDINTERTERM

- Interest in entertainment production sectors
- Valuable to students with interest in service providers
- Special value to those with interest in videogames

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in West Hollywood, California. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

Immersion Experiences

ND**INTERTERM**

HELPING FAST CASUAL CUBAN CONCEPT INCREASE TRACTION
Colada Shop (Sterling, VA)
Asim Walia, CEO & Founder
(M-Th, *daily times TBD***) / Max. 4 students**

[Colada Shop](#) brings people together by transporting them into a space where conversation is flowing, strong coffee is brewed, and food & cocktails are made with the flare of Cuban flavor and life.

They first opened a location in Sterling, VA before launching their second location in downtown D.C. Colada shop also offers catering in the Northern Virginia and DC area.

With stellar press reviews and multiple awards already received, Colada Shop is looking to expand their DC success and hopefully create a highly scalable fast casual restaurant concept.

Background on the Opportunity/Challenge:
Through an analysis of competitors, similar fast-casual restaurant concepts, and Colada Shop's current performance, they're looking for help ideating to increase traction at their Sterling, VA sub-urban location. Your marketing strategy and plan should take into account the demographics in the region and the current customer archltypes. Colada Shop expects that you'll be able to gather data efficiently and convert that data into valuable insights for their executive team. They're particularly interested in learning more about their current audience and reach and barriers for individuals and businesses in the area when it comes to visiting their location. They're open to a variety of different types of promotions and changes to their menu if it will result in increased traction.

Students who enroll in this course will:
- Understand the challenges of scaling up fast casual restaurant concepts in new markets.
- Develop a plan for increasing traction within local ecosystem around sub-urban location.
- Be able to convert qualitative customer interviews and customer surveys into KPIs and meaningful data to be used by business leaders.
- Grasp the nuances and implications of suggesting different types of promotions and marketing campaigns designed to help restaurants gain traction.

Prerequisites:
This project is most suitable for MBA students that are interested in working on high-growth business challenges in the food service space. Experience in marketing strategy and restaurant/food service management is a plus.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in [Sterling, Virginia](#). **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

Immersion Experiences

NDINTERTERM

B2B SOFTWARE INDUSTRY REVIEW & MARKETPLACE INDUSTRY BENCHMARKING ANALYSIS
G2Crowd (Chicago, IL)
Jed Fudally, Senior Manager - User Acquisition & Engagement
Marie MacBain, Vice President - Research Operations
(M-Th, *daily times TBD*) / Max. 5 students

G2Crowd is the world's leading B2B software and services review platform. Until recently, selecting business software or services was difficult, risky and inherently biased. G2Crowd's real, verified user reviews help users objectively assess what's best for their business. Leverage the crowd, limit risk, and get what works!

Background on the Opportunity/Challenge:
G2Crowd is looking for help better understanding how industry professionals make decisions regarding the B2B software tools they choose. They expect this exercise will leverage best practices from other review websites, in addition to some of their biggest competitors. Their ultimate goal is to make significant headway when it comes to quantity of total reviews and the number of products that are covered with reviews in their ecosystem. Ultimately, G2Crowd is hoping that the students will then use this gathered information to make performance improvement recommendations for their software and marketing strategy so that they can gather reviews more effectively at larger volumes from reputable business leaders.

Students who enroll in this course will:
- Have the opportunity to combine data analytics with qualitative competitive research to develop real-world marketing recommendations.

Prerequisites:
- This project is suitable for MBA students with foundational Excel skills.
- Ideally, MBAs should be interested in Business Leadership, Consulting, Marketing, Innovation & Entrepreneurship.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Chicago, Illinois. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

Immersion Experiences

NDINTERTERM

Immersion Experiences

M&A ASSESSMENT FOR UNIVERSITY ENROLLMENT MANAGEMENT SOFTWARE
GlyphEd (Alexandria, VA)
Mark Sloan, President & CEO
Bradley Lewis, Director of Sales
(M-Th, *daily times TBD***) / Max. 4 students**

GlyphEd is a collaboration Between SynGlyphX and the University of Notre Dame. The Company utilizes proprietary advanced data visualization software to help provide enrollment management tools to Universities. GlyphEd™ is transforming the way Colleges and Universities interact with data to discover insights and make informed decisions. GlyphEd's innovative approach to data visualization is being applied to: Enrollment Management; Retention & Student Success; Academic Research, and Data Science Curriculum. GlyphEd™ software is in use by faculty, students, and administrators – and is credited with: attracting non-traditional students and optimizing recruiting travel spend; improving retention by 5 points; discovering a lifesaving insight in a patient medical study; and improving a student's performance in the video gameCounter Strike. GlyphEd™ sits on top of existing IT investments,in CRM systems,and other data – allowing colleges and universities to get a greater return on IT investments.

Background on the Opportunity/Challenge:
GlyphEd is looking for help administering a comprehensive industry assessment for M&A targets. Their goal is to identify key players that are involved with data analytics in the education space. Ideally, they would like to profile acquisition targets based on their business model, product features, and market penetration. They're also looking to assess where there are clear strategic or product-related synergies with GlyphEd as part of the acquisition assessment. This exercise also includes recommendations around how a merger would enhance the overall GlyphEd's overall business and how they would ideally go about integrating any new businesses into their existing business.

Students who enroll in this course will:
- Have the opportunity to combine data analytics with qualitative competitive research to develop real-world M&A recommendations.
- Understand the complexities of analyzing businesses with limited data.
- Develop an understanding of how to think through implications of M&A activities.

Prerequisites:
This project is suitable for MBA students interested in the higher education space, with interest administering industry research and due diligence on viable acquisition targets.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Alexandria, Virginia. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

NDINTERTERM

IDENTIFYING ACQUISITION TARGETS IN DATA MANAGEMENT AND HEALTHCARE ANALYTICS

Graham Allen Partners (South Bend, IN)
Mary Jo Ogren, Director (Project Liaison) (ND '96)
Jamie Lukaszewski, Director (Project Lead)
(M-Th, *daily times TBD*) / Max. 5 students

Graham Allen Partners is a private investment firm focused on partnering with entrepreneurs to build great companies. Our team has extensive executive-level experience investing in, building, and operating early-stage technology and technology-enabled companies. We utilize our experience to create value in our portfolio companies, deliver market leading returns for our investors, and positively contribute to the communities we serve. Our current investment focus is big data and analytics and we are proud to support six local portfolio companies that are doing transformational work in the South Bend area. Current portfolio companies include, but are not limited to: Data Realty, Aunalytics, MicroIntegration, SEMMA Health, Qumulus Solutions, and AC3. The Graham Allen Partners team spends each day supporting our portfolio companies by raising capital, attracting talent, executing acquisitions, and providing a suite of professional services designed to allow our companies to focus on their most critical business functions: building their technology and delivering value to clients.

The Opportunity:
Graham Allen is currently focused on strategic acquisitions within the data management and healthcare analytics field. We have closed three deals this year and have letters of intent out on two others, and were looking to identify others. For this project, MBA students will assist with identifying target companies for acquisition and creating financial models for potential deals. Students will also be asked to research competitors. *Students will be required to sign a confidentiality agreement.*

The students who participate in this project will:
- Gain experience in researching, analyzing and recommending acquisition targets.
- Have the opportunity to directly influence the strategic direction of a company.
- Gain experience in working with early-stage and portfolio companies.

Prerequisites:
Students with concentrations in Corporate Finance or Investments are preferred, as is previous experience building complex financial models.

PLEASE NOTE: A confidentiality agreement will be required since access to sensitive and confidential information will be utilized.

Logistics:
This "Interterm" opportunity will take place at the Graham Allen Partners office in South Bend, IN. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

About:
Mary Jo Ogren (Project Liaison) is a director at Graham Allen Partners and is responsible for human resources, recruiting, and training for the firm and its portfolio companies. Chief among her strategic priorities is to ensure that the Graham Allen Partners family of companies is able to attract and retain top technical talent. She also manages the firm's corporate training division and works closely with community partners as they strive to meet the training needs of their increasingly diverse workforce.

Immersion Experiences

NDINTERTERM

Prior to joining Graham Allen Partners in 2009, Mary Jo spent 13 years as a classroom teacher and is a licensed School Administrator. Her dedication to urban students and students with special needs was recognized in 2007 when she was named Teacher of the Year.

Mary Jo earned a bachelor of arts degree in sociology from the University of Notre Dame, a master of science degree in education from Indiana University, and completed the School Administration Licensure Program at Bethel College. She serves on the boards of the Family & Children's Center, Corvilla, and Chiara Home.

Jamie Lukaszewski (Project Lead), along with Rob Klinger, oversee the responsibilities of the Data Realty Deal Team and participate in all key aspects of the deal process including deal origination, financial, strategic, risk analysis, transaction structuring, and negotiation. Jamie is also responsible for maintaining strong relationships with key stakeholders including financial institutions, limited partners and senior management.

Jamie's experience includes four years at KPMG as a Senior Associate in their Investment Banking and Transactions & Restructuring divisions. In that role, Jamie assisted private equity and corporate clients on buy-side and sell-side activity. His deal experience includes the Carlyle Group's acquisition of DuPont Performance Coatings for $4.9 billion, American Family Insurance's acquisition of Homesite Group for $660 million, Odyssey Investment Partners acquisition of Integrated Power Services, Graham Partners acquisition of Brenner Aerospace, and Odyssey Investment Partners sale of TNT Crane and Rigging for $550 million.

Jamie also spent time in the start-up world selling a post-production company he co-founded (The Sweatshop Post) and acting as Chief Financial Officer for RocketJump. At RocketJump, Jamie oversaw the entire operation of the business closing partnerships with Netflix, Lionsgate, Hulu and Alibaba as well as raising a Series A round from blue chip venture capital fund, Greycroft Investment Partners, a feat completed by less than 1% of all businesses.

Jamie earned a B.S. in accounting and finance from the Indiana University Kelley School of Business and is a Certified Public Accountant (CPA).

Immersion Experiences

NDINTERTERM

DESIGNING A MENTOR PROGRAM
Graham Allen Partners (South Bend, IN)
Mary Jo Ogren, Director (Project Director) (ND '96)
(M-Th, *daily times TBD*) / Max. 2 students

Graham Allen Partners is a private investment firm focused on partnering with entrepreneurs to build great companies. Our team has extensive executive-level experience investing in, building, and operating early-stage technology and technology-enabled companies. We utilize our experience to create value in our portfolio companies, deliver market leading returns for our investors, and positively contribute to the communities we serve. Our current investment focus is big data and analytics and we are proud to support six local portfolio companies that are doing transformational work in the South Bend area. Current portfolio companies include, but are not limited to: Data Realty, Aunalytics, MicroIntegration, SEMMA Health, Qumulus Solutions, and AC3. The Graham Allen Partners team spends each day supporting our portfolio companies by raising capital, attracting talent, executing acquisitions, and providing a suite of professional services designed to allow our companies to focus on their most critical business functions: building their technology and delivering value to clients.

The Opportunity:
As our companies grow, it is becoming more important that we focus on onboarding, employee engagement, and professional development. We believe that launching a mentoring program will help us focus on all three of these areas. However, we want to be very thoughtful and deliberate about the development and implementation of this new initiative. As such, we are looking for students interested in helping us review best practices to develop a comprehensive plan for our new mentoring program.

The students who participate in this project will:
- Develop all requires materials for a mentoring program launch:
    - Program Overview & Guidelines (based on best practice)
    - Guidelines for mentors
    - Guidelines for mentees
    - New Mentor Training Presentation
- Gain experience with the onboarding process and its importance for new hires.
- Impact how managers bring new employees into Graham Allen's companies.

Prerequisites:
Students with an interest in human resources, or onboarding of new hires as a future manager are ideal for this opportunity.

PLEASE NOTE: A confidentiality agreement will be required since access to sensitive and confidential information will be utilized.

Logistics:
This "Interterm" opportunity will take place at the Graham Allen Partners office in South Bend, IN. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

About:
Mary Jo Ogren (Project Director) is a director at Graham Allen Partners and is responsible for human resources, recruiting, and training for the firm and its portfolio companies. Chief among her strategic priorities is to ensure that the Graham Allen Partners family of companies is able to attract and retain top technical talent. She also manages the firm's corporate training division and works closely with community partners as they strive to meet the training needs of their increasingly diverse workforce.

Immersion Experiences

ND INTERTERM

Prior to joining Graham Allen Partners in 2009, Mary Jo spent 13 years as a classroom teacher and is a licensed School Administrator. Her dedication to urban students and students with special needs was recognized in 2007 when she was named Teacher of the Year.

Mary Jo earned a bachelor of arts degree in sociology from the University of Notre Dame, a master of science degree in education from Indiana University, and completed the School Administration Licensure Program at Bethel College. She serves on the boards of the Family & Children's Center, Corvilla, and Chiara Home.

Immersion Experiences

NDINTERTERM

POLICIES AND MANAGEMENT OF REMOTE TEAM MEMBERS
Graham Allen Partners (South Bend, IN)
Mary Jo Ogren, Director (Project Director) (ND '96)
(M-Th, *daily times TBD***) / Max. 5 students**

Graham Allen Partners is a private investment firm focused on partnering with entrepreneurs to build great companies. Our team has extensive executive-level experience investing in, building, and operating early-stage technology and technology-enabled companies. We utilize our experience to create value in our portfolio companies, deliver market leading returns for our investors, and positively contribute to the communities we serve. Our current investment focus is big data and analytics and we are proud to support six local portfolio companies that are doing transformational work in the South Bend area. Current portfolio companies include, but are not limited to: Data Realty, Aunalytics, MicroIntegration, SEMMA Health, Qumulus Solutions, and AC3. The Graham Allen Partners team spends each day supporting our portfolio companies by raising capital, attracting talent, executing acquisitions, and providing a suite of professional services designed to allow our companies to focus on their most critical business functions: building their technology and delivering value to clients.

The Opportunity:
Over the past nine years, we have seen our team grow from 2 - 250 people. During that time, almost every team member was located onsite in South Bend, Indiana. However, we are realizing that in order to grow at the pace we hope, we are likely to have to consider remote employees. As such, we recently brought on three new remote team members as a way to see if this can work. This new arrangement is bringing up several questions about how to effectively manage remote team members and what we should be doing to make sure that this arrangement can be successful - especially if we plan to scale and bring on even more remote people.

We are looking for students interested in helping us review the pro's and con's and best practices related to remote employees and help us craft our own set of guidelines and best practices for making sure that remote employees stay engaged and supported; while fulfilling their business objectives.

The students who participate in this project will:
- Develop a presentation that examines the pro's and con's of remote employees and recommends best practices for making remote employment successful.
- Develop company guidelines for the management and engagement of remote employees.
- Provide specific recommendations for how we can keep remote employees engaged and feeling like a valued part of the team.
- Provide a financial review of the costs of remote employees vs onsite employees.
- Gain experience as future managers on best practices for managing remote employees.
- Impact how Graham Allen can meet its growing staffing needs while managing the benefits and drawbacks of flexible work arrangements.

Prerequisites:
Students with an interest in human resources, those who may manage or work on remote teams, or those who desire to tackle the issues around flexible work arrangements are ideal for this opportunity.

PLEASE NOTE: A confidentiality agreement will be required since access to sensitive and confidential information may be utilized.

Immersion Experiences

NDINTERTERM

Logistics:
This "Interterm" opportunity will take place at the Graham Allen Partners office in South Bend, IN. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

About:
Mary Jo Ogren (Project Director) is a director at Graham Allen Partners and is responsible for human resources, recruiting, and training for the firm and its portfolio companies. Chief among her strategic priorities is to ensure that the Graham Allen Partners family of companies is able to attract and retain top technical talent. She also manages the firm's corporate training division and works closely with community partners as they strive to meet the training needs of their increasingly diverse workforce.

Prior to joining Graham Allen Partners in 2009, Mary Jo spent 13 years as a classroom teacher and is a licensed School Administrator. Her dedication to urban students and students with special needs was recognized in 2007 when she was named Teacher of the Year.

Mary Jo earned a bachelor of arts degree in sociology from the University of Notre Dame, a master of science degree in education from Indiana University, and completed the School Administration Licensure Program at Bethel College. She serves on the boards of the Family & Children's Center, Corvilla, and Chiara Home.

Immersion Experiences

NDINTERTERM

SILICON VALLEY TECHNOLOGY TO THE ADVANCED MANUFACTURING INDUSTRY IN THE HEARTLAND

Heartland Ventures (South Bend, IN)
Mark Accomando (ND MBA '17)
(M-Th 8:30am-4:30pm) / Max. 2 students

Heartland Ventures is a Midwestern-based venture capital firm. They co-invest alongside top to add immediate revenue to high-growth startups disrupting traditional Midwestern industries. They create value by leveraging their network of senior executives at industry leading corporations to validate technologies and become pilot customers, even before they invest.

Heartland Ventures works closely with dozens of Northern Indiana based corporations to help them solve significant business problems by leveraging cutting edge technology. The scope of this project will be evaluating preselected startup technology pitch decks to uncover the best investment opportunities. Then, the students will tour and interview local business owners uncover alignment on their existing business problems and the proposed technology solutions from the startups.

Students who enroll in this course will have:
- Behind the scenes access into the daily operations of Advanced Manufacturing corporations.
- Access to managers and executives for interviews and on-site learning.
- A preview into the Heartland proprietary sourcing process and network.

Students taking this course can expect to gain:
- Real-world consulting and advisory experience with well-established Advanced Manufacturing corporations.
- Venture Capital deal sourcing and technology research.
- The opportunity to present final recommendations to Venture Partners and Corporation Executives for execution.

Prerequisites:
Students interested in pursuing careers in Venture Capital, as well as students interested in solving unique business problems through technology are best suited for this opportunity. Some previous experience in manufacturing or technology is preferred, but not required.

PLEASE NOTE: Registered students will need to submit their resume and a one paragraph response to, "Why is this opportunity interesting to you?" Details on these requirements will be sent to registered students.

Logistics:
This Interterm Immersion will be based in South Bend, IN with local travel to companies within a 50 mile radius of the area. No overnight travel is required, and details for transportation to/from company sites will be arranged on the first day of the Interterm.

About Mark Accomando:
Mark joined the Heartland team in June of 2017. He established the Silicon Valley and New York City offices to lead the firm's deal sourcing and founder interactions. Mark has over a decade of business leadership and investment experience within the technology space. Most recently, Mark was a full-time student at the University of Notre Dame, where he received his MBA. During his time at Notre Dame, Mark interned with several Venture Capital and Investment firms, as well as consulted with high-growth

Immersion Experiences

ND**INTERTERM**

startups in Silicon Valley. Prior to receiving his MBA, Mark was a Vice President in charge of strategy at a retail travel technology company based in Long Island, New York. Additionally, Mark co-founded an Angel Investment firm and currently sits on the Board of Directors for DH Enterprise & Associates. Mark received a BS in Entrepreneurship from Muhlenberg College in Allentown, Pennsylvania.

Immersion Experiences

GROWING CUSTOMER ACCOUNTS BY CREATING A PREMIUM CHEF-CONNECTED EXPERIENCE

HUNGRY Marketplace (Arlington, VA)
Shy Pahlevani, President & Co-Founder
Eman Pahlevani, Co-Founder
(M-Th, *daily times TBD*) / Max. 5 students

HUNGRY is a sharing economy platform that is revolutionizing office catering by providing exclusive access to top chefs making incredible food. HUNGRY already has a network of 60+ top local chefs that they partner with to provide amazing catering experiences. They work with former White House chefs, a 3-time Chopped Champion, James Beard Award winning chefs, and many internationally acclaimed chefs.

They boast a better approach to office catering since each of the professional chefs focus on only a handful of their very best dishes, thus ensuring each meal is both exceptional and truly authentic. HUNGRY also prices very competitively with regular restaurant food and ordinary catering services. They already have many happy customers including Twitter, AOL, Hilton, Sotheby's, Deloitte, Cooley, 1776, Metro Offices and many other local companies that value their amazing food experience.

Background on the Opportunity/Challenge:
HUNGRY needs help elevating their customer experience from great tasting food to a true chef-connected experience. They need help researching, interviewing, and visualizing data related to key stakeholders like admins/office managers (buyers) and end users (those who are eating the food). They're ultimately trying to create better customer loyalty and fanatics that are open to sharing their experience with others in their network.

The ultimate goal is to help HUNGRY shift the business from a sales-driven, linear growth model to one with more of an exponential growth profile. They want to leverage best practices from companies like Uber that provide premium offerings with higher margins alongside traditional offerings (like Uber Black), which can help them scale more quickly.

Students who enroll in this course will:
- Understand the nuances of a highly fragmented and saturated food service market.
- Develop a better understanding of how high-growth businesses assess new offerings and product differentiation tactics
- Be able to convert qualitative interviews into comprehensive data and insights for business leaders.

Prerequisites:
This project is most suitable for MBA students that are interested in working on high-growth business challenges in the food service space. Experience around marketing, data visualization, and software products is a plus.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Arlington, Virginia. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

Immersion Experiences

NDINTERTERM

UNIVERSITY OF NOTRE DAME
mendoza College of Business

MARKET ANALYSIS FOR KEY INITIATIVES
Old National Bank (Evansville, IN)
Troy Kirbach, Director of Client Success
Luke Zeller, Vice President and Talent Development Officer (ND '09)
(M-Th, *daily times TBD*) / Max. 2 students

Old National Bank was established in 1834. Today we are the largest financial services holding company headquartered in Indiana. We provide an array of services to our clients which include Retail Banking, Investments, and Wealth Management. At Old National we believe that by helping our associates balance work life with home life, we create a more productive workforce and a stronger company. In 2018, Ethisphere Institute announced Old National Bank as one of the World's Most Ethical Companies for the seventh consecutive year.

The Opportunities:
- Prepare a presentation for the Executive Leadership Group with recommendations where a Commercial Hub could be located, hinging on a variety of economic dependencies.
- Prepare a comparative analysis for the Executive Leadership Group that highlights the types of technology available within peer banks that increase the client experience. Examples include the use of pay-to-pay between individuals, and mobile banking.

The student(s) who participates in this project will have:
- Face-to-face interaction with executive leadership.
- Analytics of key market locations.
- Analytics of peer bank technology use.
- The ability to influence the company's decision making in key areas.

The student who participates in this project can expect to learn:
- How to work efficiently and effectively under a rapidly approaching deadline.
- Important demographic characteristics affecting these types of decisions.
- Helpful presentation skills.

Prerequisites:
Familiarity with Microsoft Office systems. Experience in creating detailed and outlined business presentations.

PLEASE NOTE: The registered student will submit their resume for introductory purposes, and a video teleconference may be scheduled to facilitate introductions and provide additional information leading into the week. A non-disclosure project agreement will be required as sensitive bank and demographic data will be utilized.

Logistics:
This "Interterm" Immersion will take place at the Old National Bank headquarters located in Evansville, Indiana approximately 5 hours drive from South Bend. **Students will need to secure transportation and lodging on their own.** Students are encouraged to drive as there are no direct flights to Evansville. Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

About:
Troy Kirbach is the Director of Client Success for Old National Bank. He joined the company in 2018 in the Finance department to develop and implement process re-engineering throughout the organization.

Immersion Experiences

NDINTERTERM

Prior to joining Old National, Troy worked in management consulting for 15 years, focusing on a wide variety of industries, including manufacturing, health care, financial institutions, and oil and gas, holding senior positions throughout his career.

He is a graduate of Southern Illinois University of Edwardsville with a Bachelors' degree in communication with a minor in Business. Troy is also a Six Sigma Black Belt and holds many quality certificates through the American Society for Quality (ASQ).

Luke Zeller is a Vice President and Talent Development Officer at Old National Bancorp. He joined Old National in 2017 as a talent strategy specialist.

Prior to joining Old National, Luke served in business development for Premier Healthcare from 2015-2017. Luke played professional basketball from 2009-2015 including a season in the NBA with the Phoenix Suns. He is also President of DistinXion, a non-profit organization that teaches character and leadership through sports. Luke's business plan for DistinXion began in the Social Venture Business Plan Competition at the Gigot Center for Entrepreneurship at Notre Dame in 2009, finishing in the semi-finals of the competition.

He is a graduate of the University of Notre Dame with a Bachelors' degree in business management with a focus in entrepreneurship. Luke is also certified in Gallup Strengths Finder, Caliper Foundations, and is a Habitudes Facilitator.

Immersion Experiences

NDINTERTERM

FINISHED GOODS INVENTORY MANAGEMENT
Steel Warehouse (South Bend, IN)
Ted Lerman, CEO, Steel Warehouse
Randy Parsons, Director of Steel Procurement & Logistics, Steel Warehouse
(M-Th, *daily times TBD*) / Max. 4 students

Steel Warehouse is a steel service center engaged in the activity of distributing and processing carbon flat rolled steel. With 15 divisions and an international presence in Mexico and Brazil, its sales top $1 billion annually. Family owned for 70 years, Steel Warehouse serves the agricultural, construction, transportation, and equipment machinery markets.

Background on the Challenge:
Steel Warehouse procures steel from mills and processes the raw steel into many different forms to the specifications dictated by its varied customer base. The company produces based on customized stocking levels in order to maintain acceptable service levels for its customers. These stocking levels must buffer changes in demand patterns, potential quality issues that arise, and machine down time to name a few of the challenges.

Students will analyze the full supply chain (forecast, order, scheduling, production, shipping) for several key customers and make recommendations on how to produce and hold an optimum level of inventory with enough material to maintain the expected service level but not more.

Students who enroll in this course will:
- Gain experience with analyzing and recommending process improvements in production and inventory management within a customized and variable client service environment.
- Advance the knowledge and understanding on a client's current and 'live' area of inquiry.
- Gain the opportunity to do a deep-dive into a commoditized and volatile industry.
- Have access to managers and executives for questions, guidance, and on-site learning.
- Present final recommendations to the Steel Warehouse executive team for consideration.

Prerequisites:
This opportunity is ideal for students with previous manufacturing, operations or supply chain experience, or those looking to focus on those areas. Previous experience with process optimization either on the job or from coursework is preferred, but not required.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This Immersion will be based in South Bend, Indiana at the Steel Warehouse corporate office for part of the week. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

Immersion Experiences

NDINTERTERM

PACKAGING ANALYSIS OF STEEL PRODUCTS
Steel Warehouse (South Bend, IN)
Ted Lerman, CEO, Steel Warehouse
Randy Parsons, Director of Steel Procurement & Logistics, Steel Warehouse
(M-Th, *daily times TBD***) / Max. 6 students**

Steel Warehouse is a steel service center engaged in the activity of distributing and processing carbon flat rolled steel. With 15 divisions and an international presence in Mexico and Brazil, its sales top $1 billion annually. Family owned for 70 years, Steel Warehouse serves the agricultural, construction, transportation, and equipment machinery markets.

Background on the Challenge:
Steel Warehouse is procuring steel from mills and processing raw steel into many different forms to the specifications dictated by its varied customer base. The packaging of these products and the materials used in packaging process, is becoming an increasingly important part of the costs. Students will be tasked with observing and evaluating the strengths and weaknesses of current packaging practices and making recommendations for improvements.

Possible areas to consider:
- Alternative materials for packaging.
- Alternative quantities to be packed in each lot.
- Potential for standardization.

Students who enroll in this course will:
- Implement observation and documentation strategies, as well as interviews to gathering data on the process for use in establishing improvements.
- Gain experience researching and comparing against similar analogs related to the issue and translate those findings into possible solutions.
- Advance the knowledge and understanding on a client's current and 'live' area of inquiry.
- Gain the opportunity to do a deep-dive into a commoditized and volatile industry.
- Have access to managers and executives for questions, guidance, and on-site learning.
- Present final recommendations to the Steel Warehouse executive team for consideration.

Prerequisites:
This opportunity is ideal for students with previous process improvement experience, manufacturing, and operations experience, or those looking to focus on those areas. This is also ideally suited for students who want exposure in a custom manufacturing environment.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This Immersion will be based in South Bend, Indiana at the Steel Warehouse corporate office for part of the week. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

IIMMERSE Experiences

NDINTERTERM

MODELING A FAST-GROWING BUSINESS OVER 3-5 YEARS
SwipeSense (Chicago, IL)
Annie Aladjova, Vice President of Finance & Operations
(M-Th, *daily times TBD*) / Max. 5 students

SwipeSense is a high-growth venture-backed company in the healthcare technology company whose mission is to eliminate Hospital Acquired Infections, a leading cause of death in the United States.

SwipeSense designs and markets the only comprehensive hand-hygiene performance system which combines sensor networks with wearable hand hygiene dispensers to provide a complete, long-term and cost-effective hand hygiene system for healthcare institutions. They've recently begun entering into new product categories to help further scale their business.

Background on the Opportunity/Challenge:
SwipeSense is expanding its product lines, and needs help building robust financial forecasts based on sales expectations. These forecasts will be used for cash runway management, investor relations, internal benchmarks, and lending applications. Students will work with the VP of Finance to learn the intricacies of the business, review the current methods of forecasting, and propose improvements to the system.

Students who enroll in this course will:
- Learn about the operating and financial planning required to run a high growth venture backed business in the Health Tech space.
- Understand how the company deals with ambiguity in future variables and modeling scenarios that encompass severable moving pieces.

Prerequisites:
- This is a financial modeling exercise, so students should have a basic understanding of financial accounting and be familiar with an Income Statement, Balance Sheet, and Statement of Cash Flows.
- This is a SaaS business, so it is important they are familiar with the concept of deferred revenue and revenue recognition.
- There is also a hardware component to the business, which adds a big layer of complexity that normal software businesses don't have, which is why Supply Chain is a preferred concentration below.
- MBA Concentrations preferred: Finance, Accounting, Supply Chain
- The current model is in Excel, so a basic knowledge here would be needed, with at least 1-2 students in the group having more advanced knowledge.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Chicago, Illinois. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

Immersion Experiences

N D INTERTERM

THIRD ROUND FUNDING & DUE DILIGENCE
TriStar Health Partners (Nashville, TN)
Christopher Rand, Co-Founder and Partner (ND '99)
(M-Th, *daily times TBD*) / Max. 2 students

TriStar Health Partners is a venture capital firm located in Nashville, TN. The TriStar Principals have been investing in healthcare companies together for over 14 years, beginning with the Vanderbilt Chancellor Fund (the "Chancellor Fund") in 2001, and has invested approximately $20 million over ten years with Vanderbilt University, producing a portfolio of 27 private companies between 2001 and 2009. Subsequently, TriStar Technology Fund, L.P. ("TriStar Economic Development Fund" or "Fund I") invested approximately $14.5 million in Tennessee-based early stage companies through the TNInvestco program. Most recently, the TriStar Principals closed TriStar Technology Fund II, L.P. ("Fund II") in 2012 and to date have invested approximately $22 million in portfolio companies across the United States. While the capital sources and goals of each of these funds were different, TriStar has consistently focused on investing in innovative healthcare companies, life science, and IT enabled healthcare services.

During their week in Nashville, students will have the opportunity to shadow the TriStar Partners. Christopher Rand '99, a co-founder and partner, will be the main host. Ad hoc activities may include attending board meetings, company pitches, etc.

TriStar is working closely with two of its portfolio companies on the distribution and product strategies. Depending on how these efforts evolve, students may be asked to work individually or as a group.

Students taking this course can expect to learn:
- How TriStar prioritizes issues in the due diligence process.
- How TriStar assesses how an individual prospective company might fit within its portfolio (portfolio construction/management).
- How early stage company Boards operate and how they prioritize issues (assuming a Board meeting can be scheduled during the "Interterm").
- How important people and relationships are and how those relationships impact how TriStar works with its portfolio company management teams and its peer investors.

Prerequisites:
This opportunity is specifically designed for students wanting to go into Venture Capital, those looking to work for a start-up or start their own company, as well as students looking towards the healthcare industry. Prior VC coursework is highly important, but not a requirement.

PLEASE NOTE: Registered students will submit a brief introductory cover letter as an overview for the company. Details on this letter will be sent to registered students.

Logistics:
This "Interterm" Immersion will take place in the TriStar headquarters located in Nashville, Tennessee. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

IIMMERSE Experiences

ND INTERTERM

UNIVERSITY OF
NOTRE DAME
Mendoza College of Business

Spring 2019
"Interm" Week
Course Descriptions

UNDERSTANDING THE BUYER JOURNEY FOR VOICEOVER TALENT
Voices.com (On-campus/Mendoza)
David Ciccarelli, CEO & Co-Founder
Steffanie Farrant, Senior UX Researcher
(M-Th, *daily times TBD*) / Max. 5 students

Voices.com, the largest voice over marketplace in the world, connects businesses and brands with voice over actors from around the globe.

Working with more than 500,000 users in 160 countries, Voices.com's professional voice talent speak over 100 languages and dialects, and complete projects ranging from animated videos, audiobooks, explainer content, television ads, radio ads and much more. Working with Voices.com means that obtaining a voice over for your project can now move at the speed of production - often, we are able to deliver auditions in hours and final files in days, all at a professional, broadcast level of quality and with exceptional service. Voices.com can also facilitate any script translation or transcreation needs that businesses have.

About the company: https://www.voices.com/company/about
Leadership team: https://www.voices.com/company/leadership
Investors: https://www.voices.com/company/investors
Industry recognition: https://www.voices.com/company/awards
Industry reports and analysis: https://www.voices.com/company/reports

Background on the Opportunity/Challenge:
As Voices.com continues to grow and change the way clients access and connect with voice-over actors across the globe, they need to gain deeper insight into their existing and prospective clients, including an analysis of their spending habits, motivators, influencers in the decision-making process and more. The goal is to inform the Voices.com management about how they might be able to better acquire and customers.

To help Voices.com, it's imperative that the students understand both current customers and prospective buyers in the US. Mendoza MBAs will engage in primary audience research to provide an in-depth look into the barriers and opportunities that exist along the voice-over purchase journey. The research will also uncover current audience perceptions of Voices.com and its competitive set, as well as test brand messaging across key audience segments.

 Students who enroll in this course will:
- Attain hands-on qualitative interview experience with industry prospects.
- Create quantitative surveys based on primary market research.
- Analyze the data they collect to formulate a calculated report that addresses the audience, spending habits, key drivers, barriers and opportunities that exist along the voice-over purchase journey.

Prerequisites:
This project is suitable for all MBA students, but especially applicable to students interested in the gig economy and online marketplaces (market-makers). This would also be best suited for students who are interested in marketing, qualitative interviewing, data gathering, and data analysis/visualization.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Immersion Experiences

NDINTERTERM

UNIVERSITY OF
NOTRE DAME
Mendoza College of Business

Logistics:
This "Interterm" Immersion will be based in Chicago, Illinois. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

Immersion Experiences

ND**INTERTERM**