Partnering With Entrepreneurs

David Feinleib
General Partner, Mohr Davidow
Who We Are

- Founded in 1983, Mohr Davidow is focused on investments in three broad areas: Technology & Digital Media; Energy & Materials; and Personalized Medicine

- $2B under management

- Investment team has deep domain expertise and operating experience

- Investment profile: Exceptional entrepreneurs building category leading companies
Track Record of Backing Winners

[Logos of various companies]
Pursuing Category Leadership
Venture Capital

Limited Partners → Committed Capital → VCs/ General Partners → Invested $$ → Entrepreneurs

Liquidity Event (IPO, Sale)
Tech Market Trends

- Tech is hot again, transformed through mobile and the social web.
- Platform disruption. Traditional media, commerce, and communication undergoing rapid change.
- Prices rising, further driving up tech market valuations.
- Tech IPO cycles tend to peak every 15 years.
Implications for Investors and Entrepreneurs

- More adoption risk can be taken out for less capital.
- Significant capital is required for significant scale.
- Product innovation drives your user/customer acquisition strategy – viral adoption, word of mouth.
- Silicon Valley is cyclical. New winners accelerate adoption faster than their peers.
What Venture Investors Look For

- Passionate entrepreneurs with a desire to build category leading companies
- Opportunity for disruptive innovation to displace incumbents
- Very large markets
Partnering With Entrepreneurs

- Venture capital investments are about partnering with entrepreneurs to build great, game-changing companies.

- Look for investors who will test your assumptions but support you through ups and downs.

- Panel discussion
Our Panel

- David Feinleib, General Partner, Mohr Davidow
- Larry Marcus, Managing Director, Walden Venture Capital
- Steve Adams, CEO, VirtuOz
Discussion Topics

- Introductions
- Markets
- Team
- Financing
- Technology / Marketing / Sales
- Liquidity events