My role in bringing case studies to life at SVB.

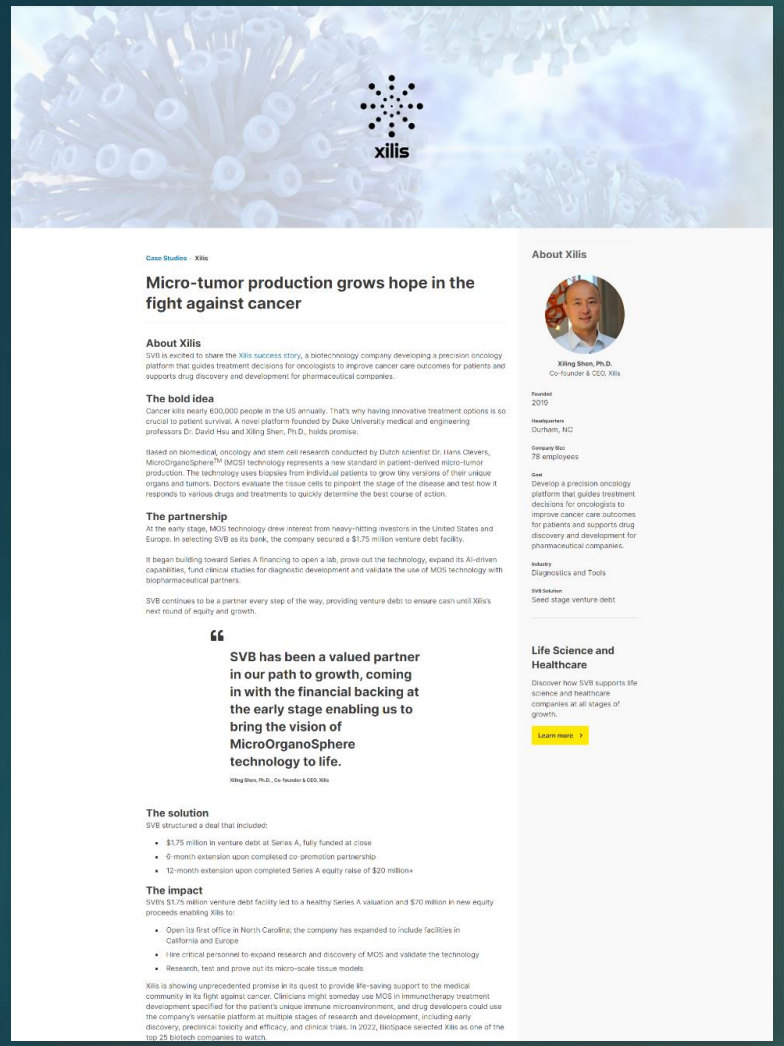
- Established the case study process with the agency.
- Developed case study submission form.
- Engaged with relationship managers to identify case studies.
- Develop content brief for the agency.
- Wrote case studies when agency was at capacity.
- Reviewed case study writing up leveraging case study submission form and client website to ensure messaging and positioning accuracy and reworked as needed to limit writing cycles.
- Worked with the project manager and RM to obtain approval.
- Submitted to compliance.
- Worked with channel marketer to add to the website.
- Created a shorter version of the case studies to be leveraged in the pitch deck.
- Established a social media banner with client quotes and worked with social team to get it add to the website.
- Shared with the client and sales once live on the website.

Client Case Studies Success Stories

Healthcare

- Researched, interviewed SVB RM and wrote the Privia Heath case study
- Designed in it Turtl for the proof-of-concept pilot
- Also interviewed client and included videos in the interactive experience
- Identified a need for a platform to support interactice content
- Adopted Turtl
- Got trained

Privia Health PDF



xilis

Case Studies · Xilis

Micro-tumor production grows hope in the fight against cancer

About Xilis

SVB is excited to share the Xilis success story, a biotechnology company developing a precision oncology platform that guides treatment decisions for oncologists to improve cancer care outcomes for patients and supports drug discovery and development for pharmaceutical companies.

The bold idea

Cancer kills nearly 600,000 people in the US annually. That's why having innovative treatment options is so crucial to patient survival. A novel platform founded by Duke University medical and engineering professors Dr. David Hsu and Xiling Shen, Ph.D., holds promise.

Based on biomedical, oncology and stem cell research conducted by Dutch scientist Dr. Hans Clevers, MicroOrganoSphere™ (MOS) technology represents a new standard in patient-derived micro-tumor production. The technology uses biopsies from individual patients to grow tiny versions of their unique organs and tumors. Doctors evaluate the tissue cells to pinpoint the stage of the disease and test how it responds to various drugs and treatments to quickly determine the best course of action.

The partnership

At the early stage, MOS technology drew interest from heavy-hitting investors in the United States and Europe. In selecting SVB as its bank, the company secured a $1.75 million venture debt facility.

It began building toward Series A financing to open a lab, prove out the technology, expand its AI-driven capabilities, fund clinical studies for diagnostic development and validate the use of MOS technology with biopharmaceutical partners.

SVB continues to be a partner every step of the way, providing venture debt to ensure cash until Xilis's next round of equity and growth.

> **SVB has been a valued partner in our path to growth, coming in with the financial backing at the early stage enabling us to bring the vision of MicroOrganoSphere technology to life.**
>
> Xiling Shen, Ph.D., Co-founder & CEO, Xilis

The solution

SVB structured a deal that included:

- $1.75 million in venture debt at Series A, fully funded at close
- 6-month extension upon completed co-promotion partnership
- 12-month extension upon completed Series A equity raise of $20 million+

The impact

SVB's $1.75 million venture debt facility led to a healthy Series A valuation and $70 million in new equity proceeds enabling Xilis to:

- Open its first office in North Carolina; the company has expanded to include facilities in California and Europe
- Hire critical personnel to expand research and discovery of MOS and validate the technology
- Research, test and prove out its micro-scale tissue models

Xilis is showing unprecedented promise in its quest to provide life-saving support to the medical community in its fight against cancer. Clinicians might someday use MOS in immunotherapy treatment development specified for the patient's unique immune microenvironment, and drug developers could use the company's versatile platform at multiple stages of research and development, including early discovery, preclinical toxicity and efficacy, and clinical trials. In 2022, BioSpace selected Xilis as one of the top 25 biotech companies to watch.

About Xilis

Xiling Shen, Ph.D.
Co-founder & CEO, Xilis

Founded
2019

Headquarters
Durham, NC

Company Size
78 employees

Goal
Develop a precision oncology platform that guides treatment decisions for oncologists to improve cancer care outcomes for patients and supports drug discovery and development for pharmaceutical companies.

Industry
Diagnostics and Tools

SVB Solution
Seed stage venture debt

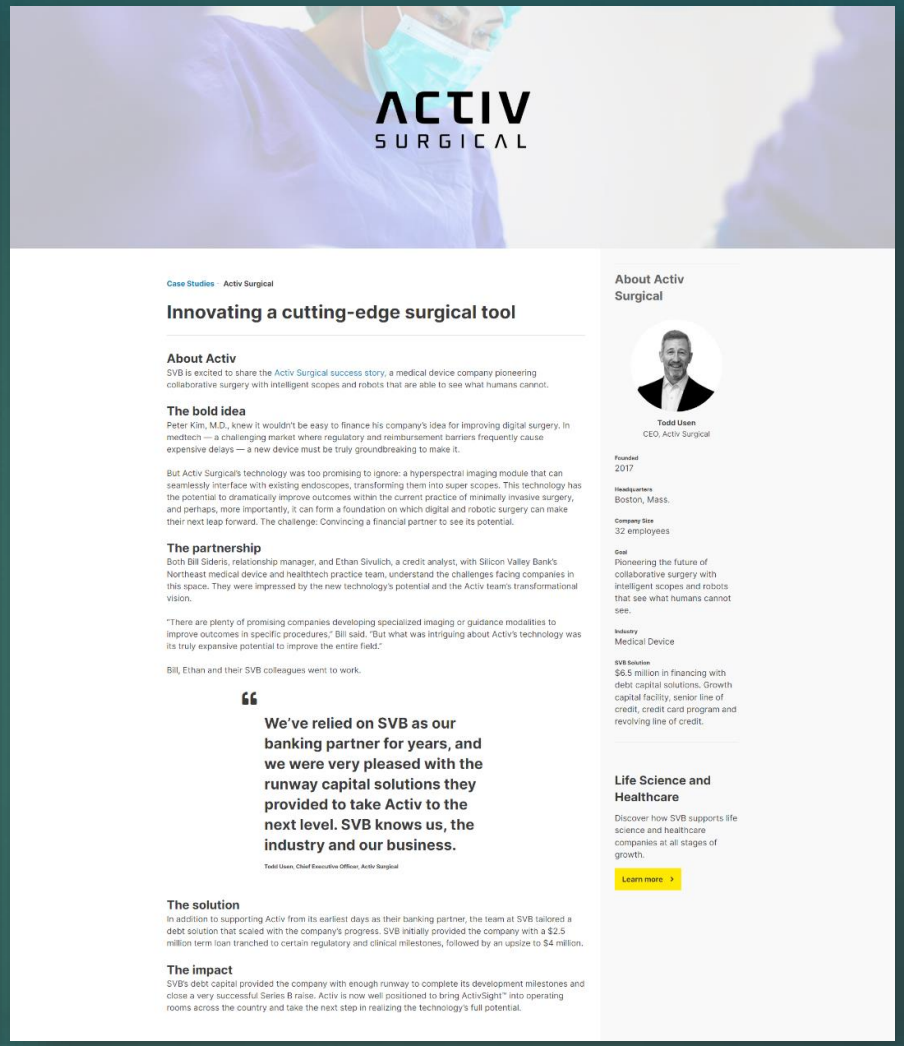
Life Science and Healthcare

Discover how SVB supports life science and healthcare companies at all stages of growth.

Learn more ›

[Xillis PDF]

https://www.svb.com/success-stories/case-studies/xilis



ACTIV SURGICAL

Case Studies · Activ Surgical

Innovating a cutting-edge surgical tool

About Activ

SVB is excited to share the Activ Surgical success story, a medical device company pioneering collaborative surgery with intelligent scopes and robots that are able to see what humans cannot.

The bold idea

Peter Kim, M.D., knew it wouldn't be easy to finance his company's idea for improving digital surgery. In medtech — a challenging market where regulatory and reimbursement barriers frequently cause expensive delays — a new device must be truly groundbreaking to make it.

But Activ Surgical's technology was too promising to ignore: a hyperspectral imaging module that can seamlessly interface with existing endoscopes, transforming them into super scopes. This technology has the potential to dramatically improve outcomes within the current practice of minimally invasive surgery, and perhaps, more importantly, it can form a foundation on which digital and robotic surgery can make their next leap forward. The challenge: Convincing a financial partner to see its potential.

The partnership

Both Bill Sideris, relationship manager, and Ethan Sivulich, a credit analyst, with Silicon Valley Bank's Northeast medical device and healthtech practice team, understand the challenges facing companies in this space. They were impressed by the new technology's potential and the Activ team's transformational vision.

"There are plenty of promising companies developing specialized imaging or guidance modalities to improve outcomes in specific procedures," Bill said. "But what was intriguing about Activ's technology was its truly expansive potential to improve the entire field."

Bill, Ethan and their SVB colleagues went to work.

> **We've relied on SVB as our banking partner for years, and we were very pleased with the runway capital solutions they provided to take Activ to the next level. SVB knows us, the industry and our business.**
>
> Todd Usen, Chief Executive Officer, Activ Surgical

The solution

In addition to supporting Activ from its earliest days as their banking partner, the team at SVB tailored a debt solution that scaled with the company's progress. SVB initially provided the company with a $2.5 million term loan tranched to certain regulatory and clinical milestones, followed by an upsize to $4 million.

The impact

SVB's debt capital provided the company with enough runway to complete its development milestones and close a very successful Series B raise. Activ is now well positioned to bring ActivSight™ into operating rooms across the country and take the next step in realizing the technology's full potential.

About Activ Surgical

Todd Usen
CEO, Activ Surgical

Founded
2017

Headquarters
Boston, Mass.

Company Size
32 employees

Goal
Pioneering the future of collaborative surgery with intelligent scopes and robots that see what humans cannot see.

Industry
Medical Device

SVB Solution
$6.5 million in financing with debt capital solutions. Growth capital facility, senior line of credit, credit card program and revolving line of credit.

Life Science and Healthcare

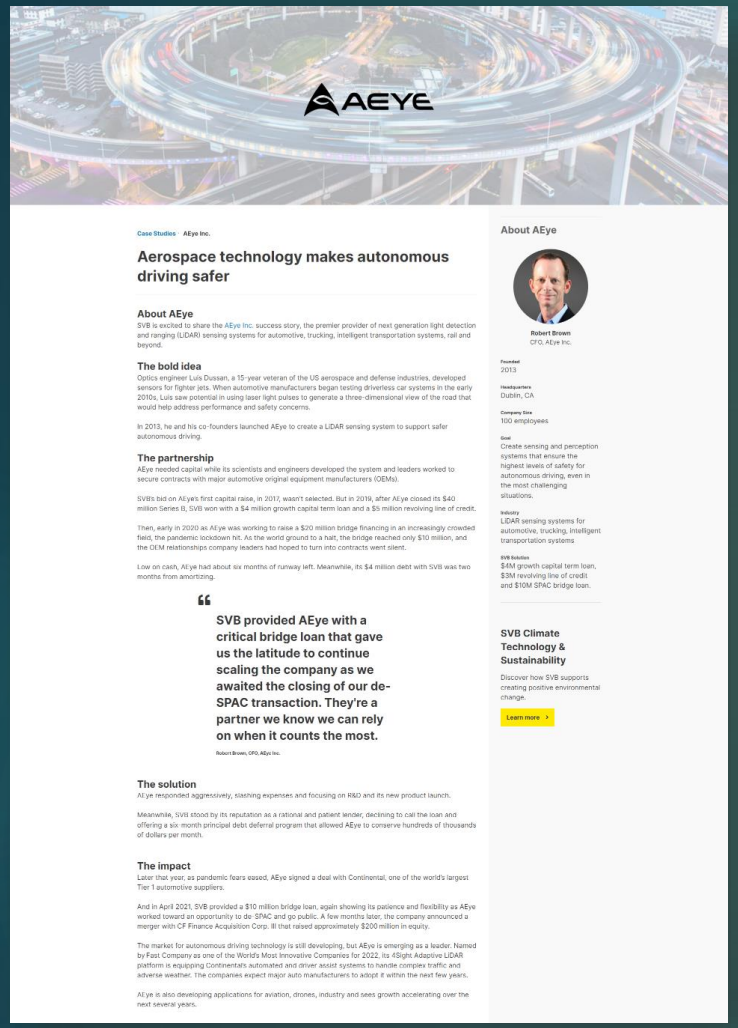
Discover how SVB supports life science and healthcare companies at all stages of growth.

Learn more ›

[Activ Surgical PDF]

https://www.svb.com/success-stories/case-studies/activ

Life Sciences and Healthcare



Aeye PDF

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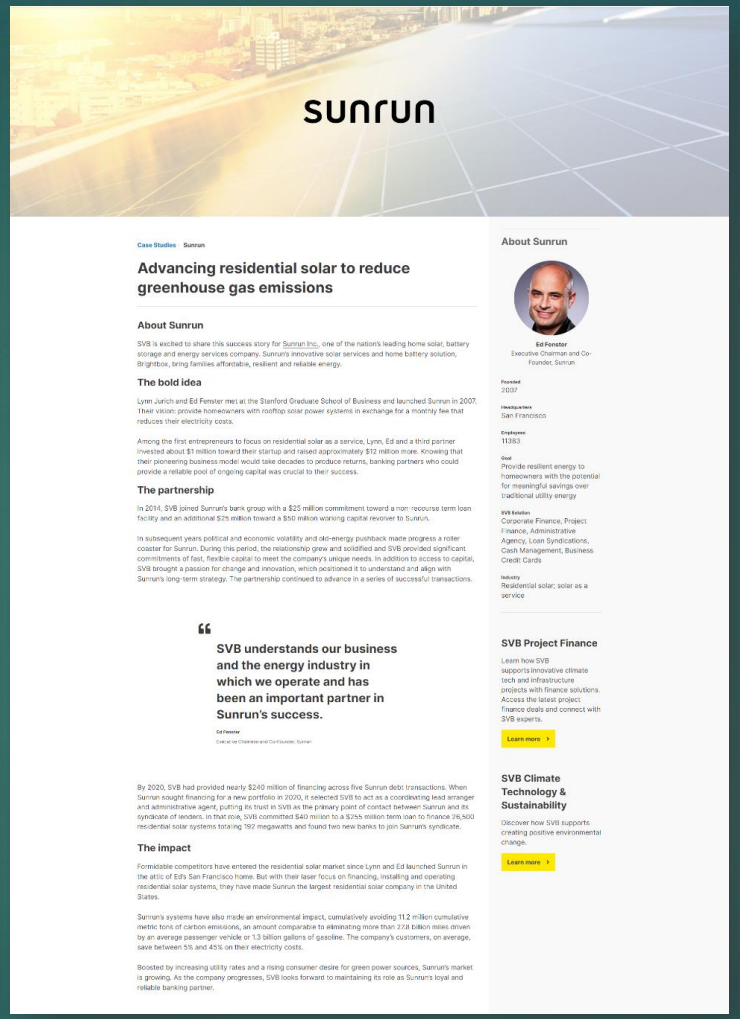

Sunrun PDF

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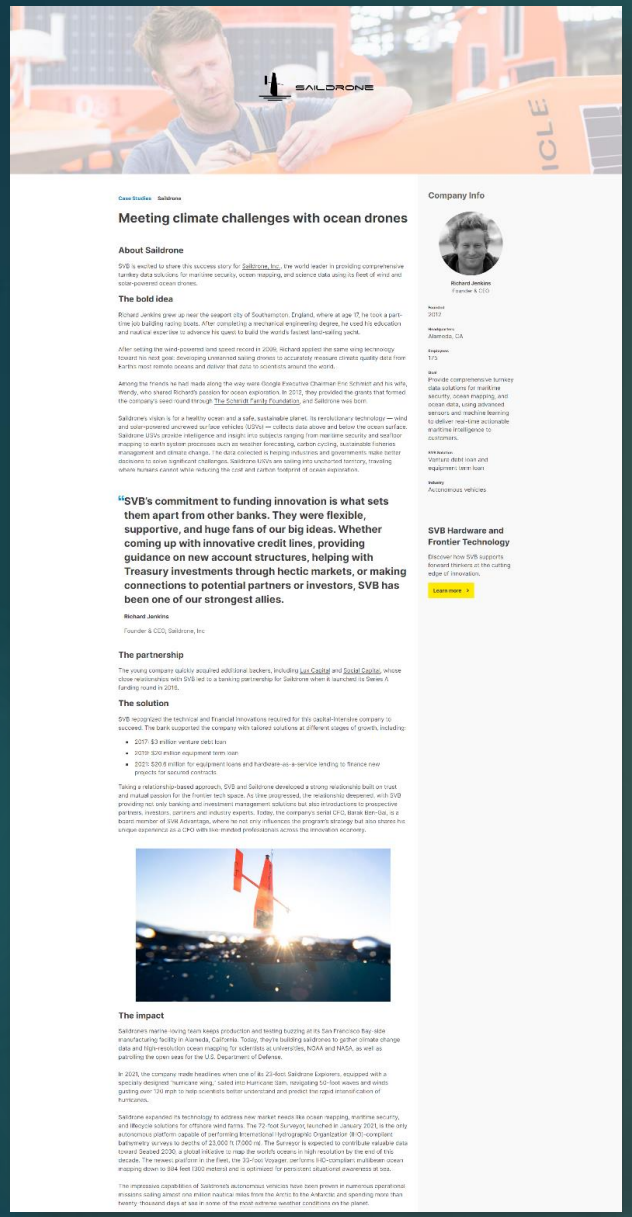
Climate Tech



Saildrone PDF

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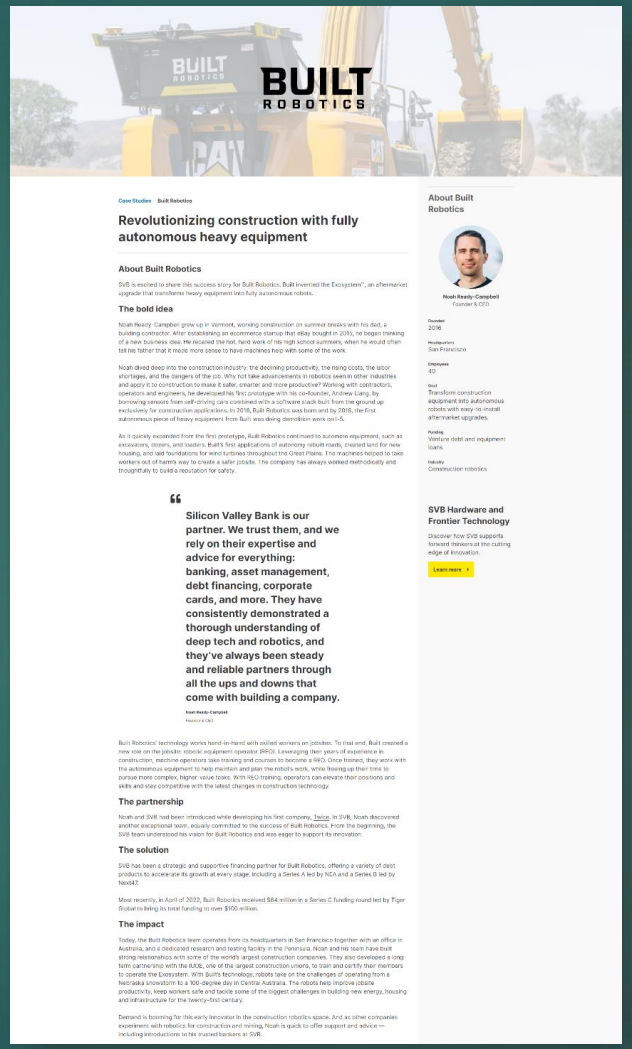

Built Robotics PDF

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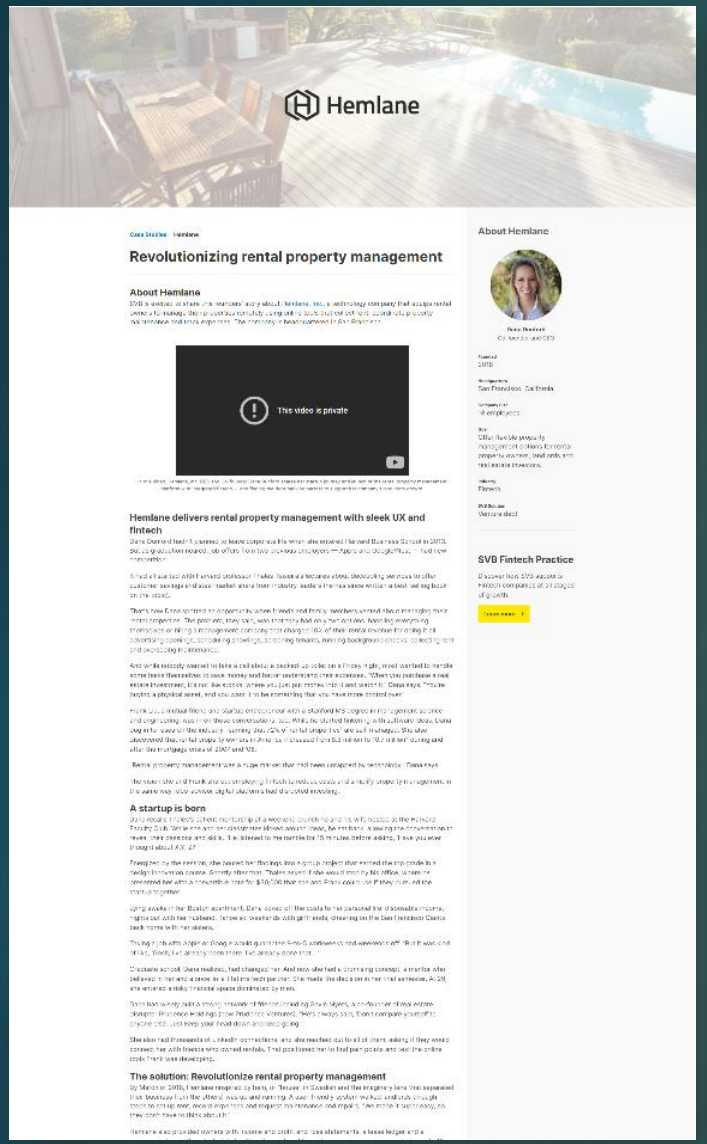
Hardware and Frontier Tech



Hemlane PDF

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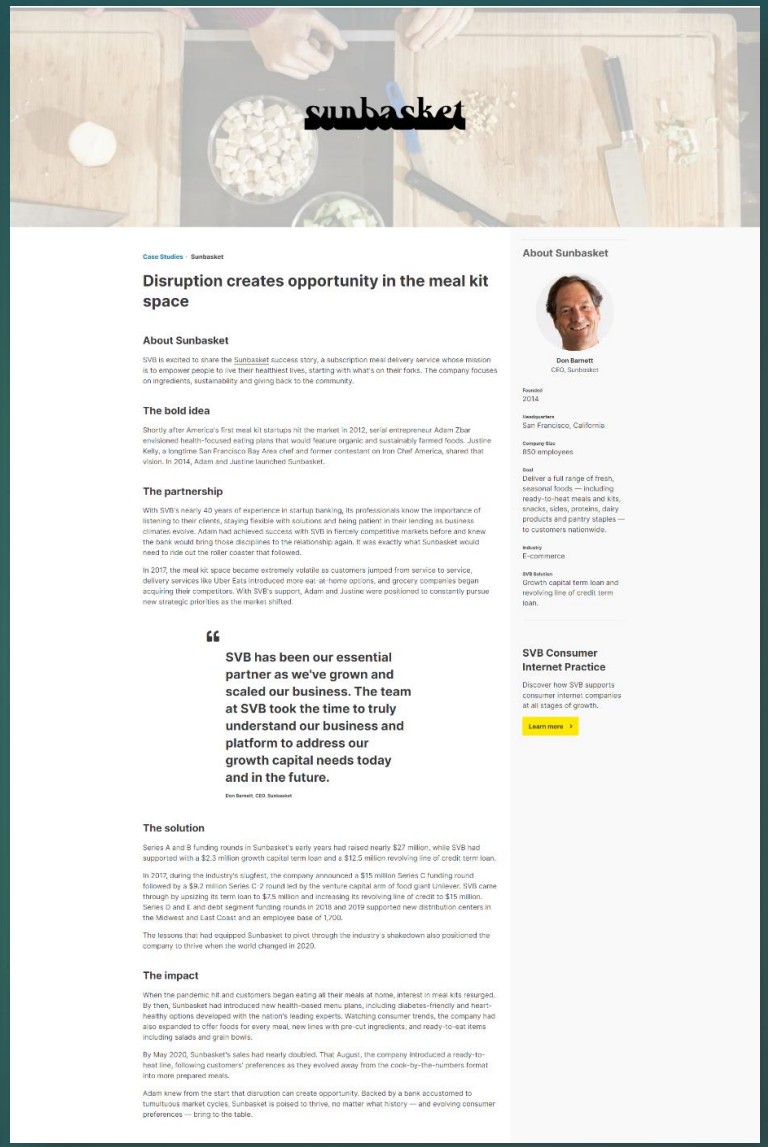

Sunbasket PDF

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Fintech and Consumer Internet

Thank you!