

## Not just CRM

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DealCloud provides a single source of truth to help you manage relationships, execute deals, and connect with external solutions and third-party data providers

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*“DealCloud has a proven track record for centralizing firmwide intelligence and transforming it into the proprietary insights your firm and people need to grow.”*

**LOKESH SETH, GENERAL MANAGER, DEALCLOUD**

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An industry as complex as the **capital markets** demands purpose-built technology that’s easily configured to meet your firm’s unique needs. DealCloud technology isn’t just a CRM — it empowers capital markets professionals to harness the cumulative intellectual capital of their firms’ people and processes. When firms implement and leverage the **DealCloud platform**, dealmakers get access to a single source of truth that enables better relationship management practices, seamless deal execution, faster due diligence, enhanced reporting and data analytics, and increased productivity.

### Markets we serve

- Private Equity
- Growth Equity
- Venture Capital
- Investment Banking and Advisory
- Credit and Leveraged Finance
- Real Estate
- Fund of Funds
- Limited Partners
- Corporate Development
- Placement Agents
- Secondaries

### Purpose-built solutions

- Relationship Management
- Business Development and Marketing
- Sourcing and Origination
- Pipeline Management
- Process and Workflow Management
- Deal Execution
- Reporting and Data Analytics
- Fundraising
- Investor Relations
- Compliance
- Data Integration

## The DealCloud platform

Your firm defines goals and mandates. Your team has the knowledge to fuel success. DealCloud has a proven track record for centralizing firmwide intelligence and transforming it into the proprietary insights your firm and teams need in order to grow.

The DealCloud platform connects disparate data sets across systems, operationalizes processes for optimal efficiency, and redefines what your firm can accomplish in a single day. Financial services organizations of all shapes and sizes can accelerate profits, mitigate risk, maintain a competitive stature in the market.

### **Close more deals, faster**

We know deals are the currency of the capital markets. Our software is built by dealmakers, for dealmakers, and includes capabilities to help ensure transactions close. By supporting business development, fundraising, investor relations, transaction advisory, and due diligence, we make it easy for dealmakers to devise strategies, originate deals, and execute goals.

### **Improve pipeline velocity and visibility**

DealCloud helps manage your pipeline while minimizing input, automatically gathering relevant emails, events, notes, and attachments directly from your inbox, calendar, and other systems of record. Every dealmaker gains real-time insight into all contacts and companies, and easily understands how to move each deal and relationship forward. Our smart-tagging technology automatically scans your activities for relevant deal information and syncs it into the DealCloud platform, giving you more time for business development and relationship management activities.

### **Streamline operations**

With DealCloud, your software can mirror your firm's specific processes. Our fully configurable workflow tools let you manage every deal, relationship, and fundraise within a single solution. By eliminating frustration and drudgery, dealmakers stay productive, engaged, and directly connected to the firm's long-term goals.

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*"DealCloud technology isn't just CRM. It empowers capital markets professionals to harness the cumulative intellectual capital of their people and processes."*

**BEN HARRISON, CO-FOUNDER, DEALCLOUD**

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## Data and analytics

Firms need to maintain visibility into every corner of the market in order to compete. That's why we created **DataCortex**, an integrated data solution that lets dealmakers manage proprietary and third-party data in one unified platform.

DataCortex lets you search and query third-party data directly from within the DealCloud platform, removing the need to toggle between systems, effectively eliminating hundreds of hours of administrative work. We've proudly partnered with leading capital markets data providers, and we'll continue to integrate with more data sources over time. Fully integrated into the DealCloud platform, DataCortex lets you easily run complex reports, analyze industry trends, and evaluate potential synergies in the same hub where you originate deals and manage relationships.

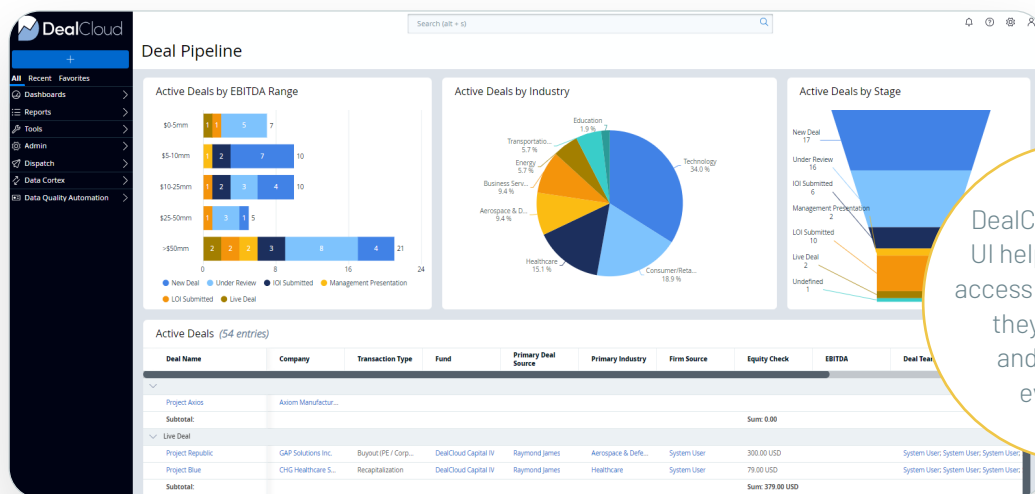
## Marketing and business development

By enabling **Dispatch** marketing solutions in your DealCloud instance, your firm's dealmakers can design custom email templates and landing pages, then schedule and send communications — such as monthly industry research reports — to key contacts. Dealmakers can view email activity, performance metrics, and analytics in the same hub where they manage relationship and business development activities. These solutions make it easier than ever for dealmakers to gather a full and transparent view of every deal and every relationship.

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## Third-party data integrations





## Implementation

The DealCloud implementation team focuses on understanding the way your firm operates, and where you want to make improvements. With hundreds of implementations under our belt, we partner with every client to ensure a smooth, thorough, and strategic information transfer so your team is set up for success from Day One. Because no two capital markets firms are exactly the same, our team takes a thoughtful and custom approach to each implementation. Having managed hundreds of successful migrations from other systems (or no system at all) to DealCloud, we can leverage technology blueprints that accelerate time to migration and ensure success.

## APIs and systems integrations

Our experience team builds integrated application programming interfaces (APIs) for a wide range of third-party solutions, helping our clients improve efficiency and processes across all areas of their business. We've implemented hundreds of customized solutions to alleviate pain points for all types of capital markets firms and across many asset classes. By building and enabling APIs between the DealCloud platform and other systems, we empower our clients to work more effectively and leverage institutional knowledge. By bringing systems together, we help our clients sync data within these disparate systems, making DealCloud the single source of truth for the firm.

## Our clients

Market-leading, global capital markets firms rely on DealCloud to work more efficiently and competitively. We've partnered with our clients to develop and deliver solutions and services that help them execute deals more effectively. For a glimpse at our growing list of global clients, and to see case studies and testimonials, please visit [dealcloud.com/clients](https://dealcloud.com/clients).



### Start leveraging the power of DealCloud

Designed for the complex needs of partner-driven capital markets firms, **DealCloud** offers vertical-specific solutions to help organizations drive growth, increase efficiency and profitability, manage risk and compliance, and deliver client success.

**Schedule a consultation** with our team to learn more about DealCloud solutions and services, as well as the markets we serve.

Schedule a demo to learn more: [dealcloud.com/schedule-a-demo](https://dealcloud.com/schedule-a-demo).

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