



CRM Built Specifically for  
Investment Banking, Designed  
by Industry Experts, Powered by  
Microsoft Dynamics 365.

## Purpose Built Relationship Management for Investment Banking and Financial Advisory

**Hitachi Solutions' Engage** for Investment Banking provides a complete relationship and deal management solution to help you understand and work those relationships in a way that positively impacts the growth of the business.

Our solution gives you access to the information and tools you need to help find viable new prospects, build the right team for every project, and collaborate effectively to close deals.

### Engage for Investment Banking enables bankers to:

- ✓ Better understand business relationships, such as sponsors, clients, investors, and legal and professional advisors, so you can leverage them successfully in the deal flow
- ✓ Improve visibility into past deals and use that data to compete more successfully today
- ✓ Access what you need, including documents, information and analysis, or team members and expert advice in real time, anywhere and on any device
- ✓ Work the deal more efficiently with streamlined, collaborative tools as well as access to pitches, deal documents, and analysis all in one place

## Industry Specific Modules

### Relationship Management

More easily track, manage, and understand a diverse range of contacts and stakeholder relationships across engagement roles, including sponsors, clients, investors, and legal and professional advisory.

- **Contact and firm management.** Easily manage your network of strategic relationships with firms of all types, including clients, prospects, financial sponsors, buyers, and legal and professional advisory
- **Profiling and visualization.** Clearly understand the relationships between stakeholders, including company and subsidiary hierarchies, sponsorship and ownership, and owner/investor hierarchies
- **Scoring and metrics.** Score relationships with people and firms so you can quickly evaluate the strength of the relationship

### Business Development & Marketing

Communicate the right messages to the right people with a set of unified tools for creating target lists, planning campaigns, executing on your marketing plan, and measuring results and ROI.

- **Communication management.** Develop and segment great marketing lists and target lists and use bulk email more efficiently to communicate your message
- **Campaign management.** Improve campaign execution and track the ROI of your marketing efforts
- **Event management.** Develop your business with webinars, conferences, analyst meetings, and other events

### Deal & Engagement Management

Enable your teams to better coordinate around the deal with collaborative tools and real-time access to client profiles, pitches, financial data, analysis, and team documents. Streamline execution with process flows designed around common activities and transactions, including mergers and acquisitions, restructuring, and advisory.

- **Pitch management.** Give pitch teams access to data, documents, and information as well as automated processes to help you optimize your efforts and maximize your chances of success
- **Deal management.** Enable end users and line of business teams with an experience tailored for each job role, including associates, analysts, and managing directors

### Dashboard & Reporting Module

Gain greater visibility into leads, projects, activities, and deal flow with customized home pages and dashboards for monitoring performance and activity. Quickly assemble reports from any data in CRM and easily share them with your colleagues so you spend less time hunting for data and take action more quickly.

- **Dashboards.** Provide insight into the effectiveness of key roles through visualizations of data in an Analyst/Associate Dashboard, Deal Dashboard, or Executive Dashboard
- **Interactive Dashboards.** Gain further visibility into your data through the ability to interact with charts and visualizations in web, tablet, phone, or Outlook app.
- **Reporting.** Easily consume information through reports on key business information including Deal Pipeline by Status, Lead Source Effectiveness, and Coverage Universe

## Why Hitachi Solutions

We offer deep industry expertise combined with decades of experience providing high-value solutions that deliver rapid return on investment. Our approach is designed to give you a faster, lower-risk implementation and rapid adoption through proven best practices.

1

It starts with **core technologies** built on Microsoft Dynamics 365 so you can get up and running quickly

2

We extend that with our own **industry modules** that give you capabilities tailored to the needs of the investment banking industry

3

Finally we deliver a **customized solution** to provide the best fit for your business, so you can focus on your unique strengths, not on basic technology

### Get Started. Request a Customized Demo.

Interested in learning more about Engage for Investment Banking? Get a customized demo to see how you can re-invent your business solutions.



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