



CRM Built Specifically for
Private Equity, Designed
by Industry Experts,
Powered by Microsoft
Dynamics 365.

Build the Right Relationships for Success

Hitachi Solutions Engage for Private Equity Firms helps you improve efficiency and intelligence throughout the investment lifecycle, from finding and evaluating opportunities, raising funds and working to the deal, to managing investments and providing transparency to every stakeholder.

Gain a complete view of your business contacts so you can connect with the right people and understand who the stakeholders and influencers are on every deal.

Hitachi Solutions Engage for Private Equity allows firms to:

- ✓ Get the right people involved at the right time with 360-degree visibility that enables you to identify relevant business contacts, see your complete history with them, and understand the strength and value of the relationship
- ✓ Work the deal more efficiently by giving everyone familiar, collaborative tools, and real-time access to the documents, updates, information, and reports they need to do their job
- ✓ Make better-informed decisions by delivering relevant, up-to-date insights into opportunities, investments, fund ownership, and the deal and fundraising pipelines

Features and Capabilities

Advanced Relationship Module

Make sure everyone in your organization has a single view of your important business contacts and relationships, including partners, investors, institutions, and legal and professional advisory. Find and engage with the right people for every deal, project, and fundraising opportunity.

→ Contact Management

Easily manage your network of strategic relationships so you can make sure you get the right people working together

→ Profiling and Visualization

Clearly understand the relationships between stakeholders, including company and subsidiary hierarchies, and owner/investor hierarchies

→ Scoring and Metrics

Connect with the right people, armed with an understanding of the relationship history, strength, and why they're important to your firm

Fund Module

Streamline how you manage fundraising opportunities to help increase your probability of success, build a strong pipeline, and report back to stakeholders.

→ Fundraising Management

Deliver a more streamlined and consistent fundraising process and track all activities, emails, phone calls and tasks related to the project

→ Investment Targeting

Reach out to the right people and organizations with profiling and analytics that help you match potential investors with opportunities

→ Analytics and Visibility

Provide superior visibility into the fundraising process, including internal and external parties, funding pipeline, and investment probability

→

Due Diligence

Streamline due diligence and accurately track stakeholders for every deal

Business Development Module

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.

→ 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 Module

Enable your teams to better coordinate around the deal with collaborative tools and access to up-to-date information, documents, and reports so they can make better-informed decisions.

→ Deal Sourcing

Understand where your deals are coming from and gain insight into your best sources of new opportunities

→ Deal Flow

Manage the deal process from end-to-end so everybody stays on the same page

→ Bid Management

Better track and manage bids and bidding groups and make sure everyone on the team can access the documents and information they need

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 private equity 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 Private Equity? Get a customized demo to see how you can re-invent your business solutions.



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