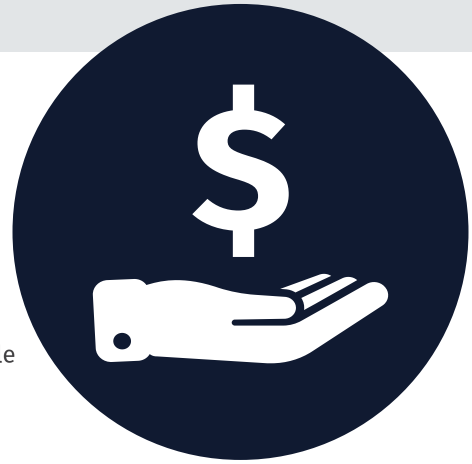
Engage for Private Equity

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.

Engage for Private Equity enables 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
- **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
- **Profiling and visualization**
  Clearly understand the relationships between stakeholders, including company and subsidiary hierarchies, and owner/investor hierarchies

Hitachi Solutions

us.hitachi-solutions.com

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.

- **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
- **Communication management**
  Develop and segment great marketing lists and target lists and use bulk email more eciently to communicate your message

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

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