CRM for
Private Equity

Connected Intelligence

In Private Equity, intelligence and connections are crucial to success, but the knowledge your future depends on is spread across your firm.

With the right tools your firm can explore and leverage that intelligence to gain competitive advantage.

xpedition.co.uk

Xpedition

9 ways our solution can make your business flow

1 Understand who knows who

Make use of network knowledge: expose connections between specialist advisors, key contacts and previous work to focus your deal origination and fundraising activities.

2 Maintain focus

Manage the lifecycle of every deal, from introduction through to exit, with visibility of every point of engagement.

3 Understand the relative value of relationships

Through comprehensive data recording, easily and reliably quantify the worth of your business relationships with advisors and intermediaries.

4 Inform the future

Build up profiles of potential investors and manage the fundraising pipeline based on accurate, consistent information from all around your business.

5 Make the most of every contact point

Record communications and meetings with contacts and organisations. Store the information in one place, building a 360 degree view of developing relationships.

6 Enable precise decision-making

Automate the production of management information across deal flow, fundraising and marketing to produce reliable, regular and comprehensive insight on which to base key management decisions.

7 Achieve high visibility

Deliver and improve successful business outcomes across the firm through better visibility across all functions and staff – empower everyone to work towards the same goals.

8 Gain total buy-in

Drive high levels of user adoption of CRM through a proven, familiar and easy-to-use environment designed so your staff will pick it up quickly and see immediate benefits.

9 Make it easy, everywhere

Enable access on any device, anywhere, any time, so your staff can update information and retrieve it the moment they need it.

Specialist solutions for Private Equity

CRM experts for Private Equity

The team at Xpedition has deep expertise working in this specialist sector. We understand the demands of Private Equity and Venture Capital operations and the complex network of investor, portfolio, advisor, talent and intermediary relationships they depend on.

Our software solution is built to capitalise on the knowledge and talent that exists outside and inside your firm, uncovering new insights and opportunities. Streamline your relationship and opportunity management processes. Put information at your fingertips for strategic planning, long term growth and tactical decision support in individual deals.

Private Equity and Venture Capital is a sophisticated business. That's why we go much further than providing a 'one size fits all' CRM solution. We have deep insight into the business processes and organisational structures that typically underpin the processes for firms across the Private Equity industry.

Our CRM industry experts have the knowledge and experience to explore, question and challenge your existing operational processes. We can help you refine them and match them to the best technology solution for your particular needs.

"We knew of Xpedition's track history within Private Equity, their expert industry knowledge really helped us to set clear project objectives and refine our requirements. We are now successfully live and we look forward to seeing the results and continuing our relationship with Xpedition."

Deutsche Beteiligungs AG

A customised CRM solution provides a 360 degree view of relationships across your entire firm.

Greater control, clarity and agility in decision-making

Gain immediate benefits from a specialised CRM solution. With a single, unified process and a 360 degree view of all engagements. Users everywhere can collaborate faster and more naturally build more responsive and personalised relationships.

Enhanced relationship management

Maintain contact profiles and view connections between organisations and deals within the system. Easily track 'who knows who' in your firm. Use the information to provide a clear picture of a contact's associates, their involvement in previous deals as an introducer and the services they have previously provided.

A comprehensive and intelligent investor view

Build complete investor profiles, and track all potential investors in a fund. By registering committed investor vehicles, you can segment current investors into groups to ease the distribution of reports and communications.

Equipped to tackle GPDR

Take greater care over personal data with a solution that logs, monitors and reports data quality. With greater access to information you'll be better placed to take action.

Constant visibility of deals

Manage your deal pipeline by keeping a single list of all active and inactive deals across the entire business regardless of location. Track deal stages and activity as well as recording internal and external deal team members, deal origination and any professional fees disbursed.

Refined talent search capability

Easily search the database to identify potential candidates for specific management roles or those who have relevant sector experience. Store CVs securely online for reference.

Powerful management and operational reporting

Achieve a vast array of both structured and ad hoc reporting through the easy-to-use reporting tool set. Drive account overviews, deal flow, investor relations, reciprocity and marketing report packs directly from the system. Report on system use and audit changes.

A simple route for totally effective CRM

Easy and cost-effective to deploy and use, our specialist application combines the precision and sophistication of a custom-built solution with the robustness and scalability of a trusted and widely deployed mainstream software product – Microsoft Dynamics 365

Familiar, intuitive interface

The application is embedded within Microsoft Outlook, so there's a familiar and easy-to-use interface. Navigation is straightforward and the screens are intuitive. Standard Outlook activities such as emails, appointments and tasks are easily tracked against relevant records in the system.

Seamless fit with existing systems

Our solution for Private Equity can integrate with your existing document management system, Microsoft Excel, Outlook and SharePoint. The result is streamlined business processes.

Anytime, anywhere mobile access

Use our CRM solution for Private Equity on Windows, Android, Apple and BlackBerry phones, devices and tablets, so you have the latest information to hand via technology you're already comfortable with.

Reduced on-site technical infrastructure

Remove the requirement for on-site technical infrastructure with our Cloud Model, which can significantly lower the cost and time for deployment. If you prefer to control your own infrastructure we can deploy on-premise instead.

We deliver real business value at low risk – on time, within budget, and in line with your goals

At Xpedition we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We're known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences and improving operational efficiency. At Xpedition, we'll show you the way.

To learn more about Xpedition, visit:
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