DEFINITY FIRST

M&A DEAL TRACKER

THE PROCESS

Pre-Screen

- Categorize business industry and vertical.
- Set prospect basic company information.
- Classify your contact relation.
- Set your team owner for the deal.

Screen

- Schedule contact meeting.
- Set a monetary value size.
- Define value driver.
- Define scope and risk.

Due Diligence

- Sign NDA.
- Create VDR on Teams.
- Gather prospect documentation and complete due diligence checklist.
- Create financial P&L.

Transition

- Notify integration team to proceed!.
- Or keep opportunity in the watch list.

CHALLENGES

1. The need for a centralized platform to share and obtain information.

- Lack of centralized notes.
- No secure repositories for confidential documents.

2. No standardized process among analysts.

3. Multiple Excel spreadsheets

- Inability to track changes without duplication.
- Difficulty in sharing process and opportunities status.

4. Confidential and proprietary information

- Multiple platforms hinder security
- Different ingestion and reporting channels complicate information security and retention.

5. Missing reporting tools to analyze historical data.

6. Difficulty engaging with company experts.

WHY DYNAMICS 365?

Microsoft Dynamics 365 is a set of intelligent business applications aimed to help you run and connect your entire business. Get more from your data and improve process efficiency while you modernize the way your company works.

Dynamics 365 is the perfect solution for M&A pipeline management. We will help you to centralize information, improve communications, optimize processes, and categorize data to obtain insights/reports. This allows companies to make critical decisions and investing in the right business opportunities.

Proposed Solution:
Dynamics 365 for M&A Deal Tracker.

Tracking of investment opportunities

Predefined stages or custom stages.
Automated process based on user input.

Centralized & Secure Access

Store account information, including highly sensitive documents.

Tracking of SME's collaboration

Invite company experts to participate in the investment process.

Goal setup & tracking

Measure performance and set targets.

Dashboard & Reports

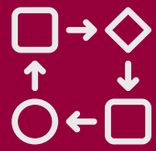
Easy access to historical data analysis and report creation, design and export.

Streamline process

Simplify or eliminate unnecessary work-related tasks to improve the efficiency.

Custom notifications

Create custom notifications according to your needs, to always be on top of all your opportunities.



Custom workflow approvals

Work with your team to approve or provide feedback.

BENEFITS

- Reduce closing time
- Boost productivity
- **Access from anywhere**
- Build smarter relationships through D365 AI tools
- Easier decision making
- **Increase opportunity visibility**
- Ensure historical data remains accessible
- Communicate easily with prospects
- **Meet investment goals**
- Reduce time spent on due diligence process

FEATURES

Native integration
with Microsoft 365 platform

Centralize & secure documents
through SharePoint Online

Shared notes
using OneNote

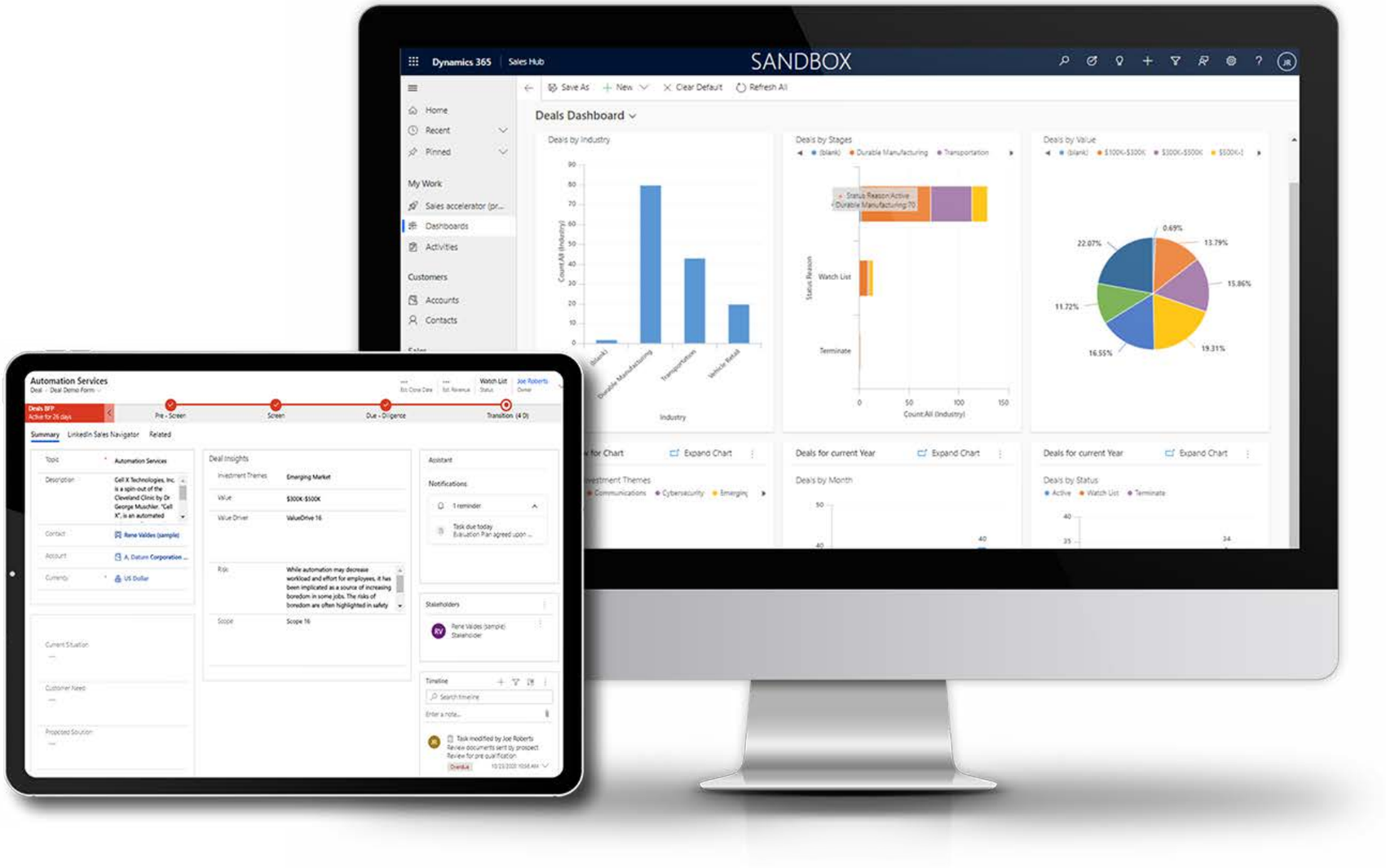
Standardized
processes and data

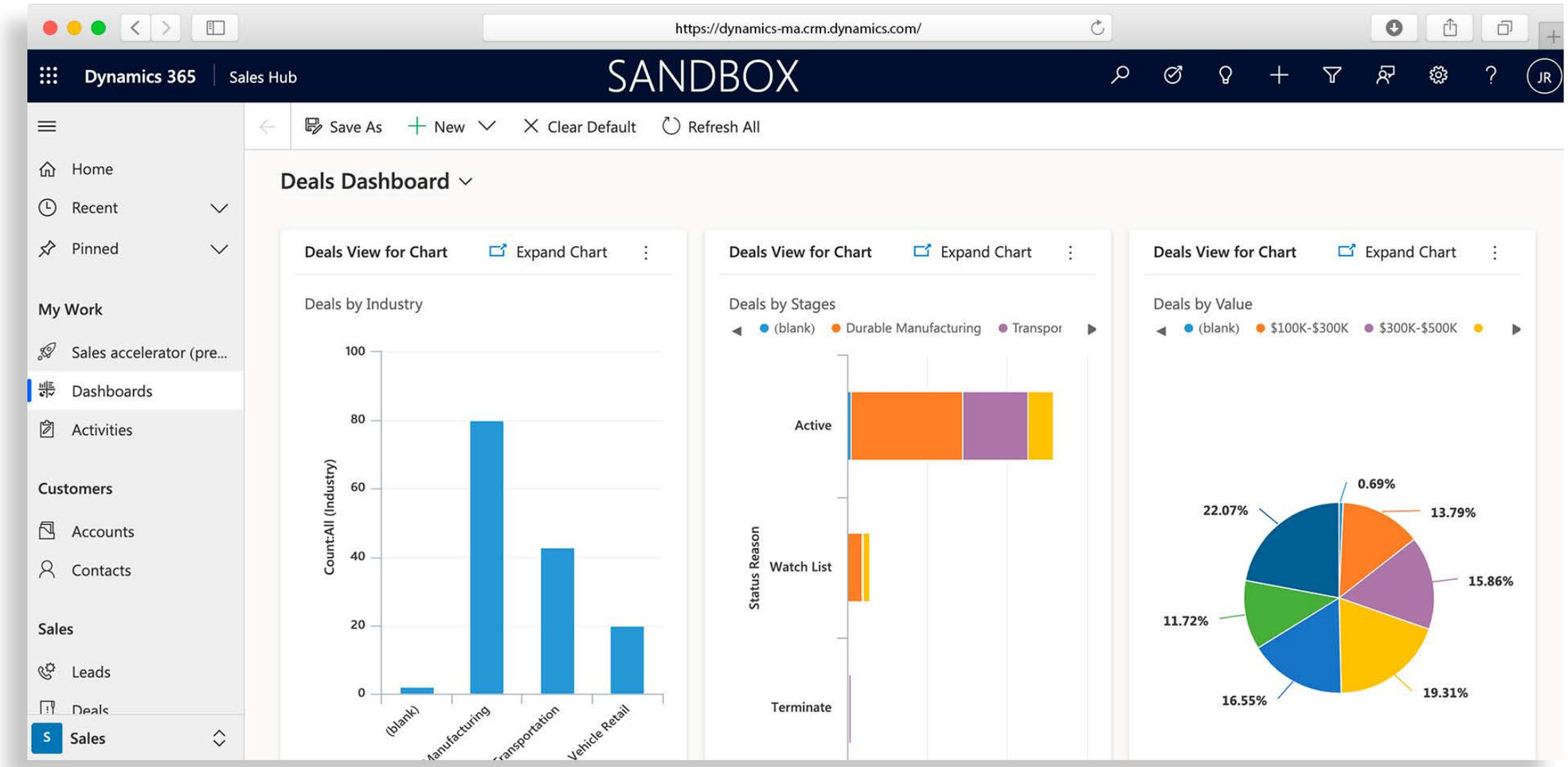
Integration with LinkedIn
for prospect validation

Integration with Outlook
to centralize communication

Reporting & Analytics
with PowerBI

Easier comparison
between multiple opportunities


Dynamics 365
Sales Hub
SANDBOX
Deals Dashboard
Deals by Industry
Deals by Stages
Deals by Value
Automation Services
Summary
LinkedIn Sales Navigator
Related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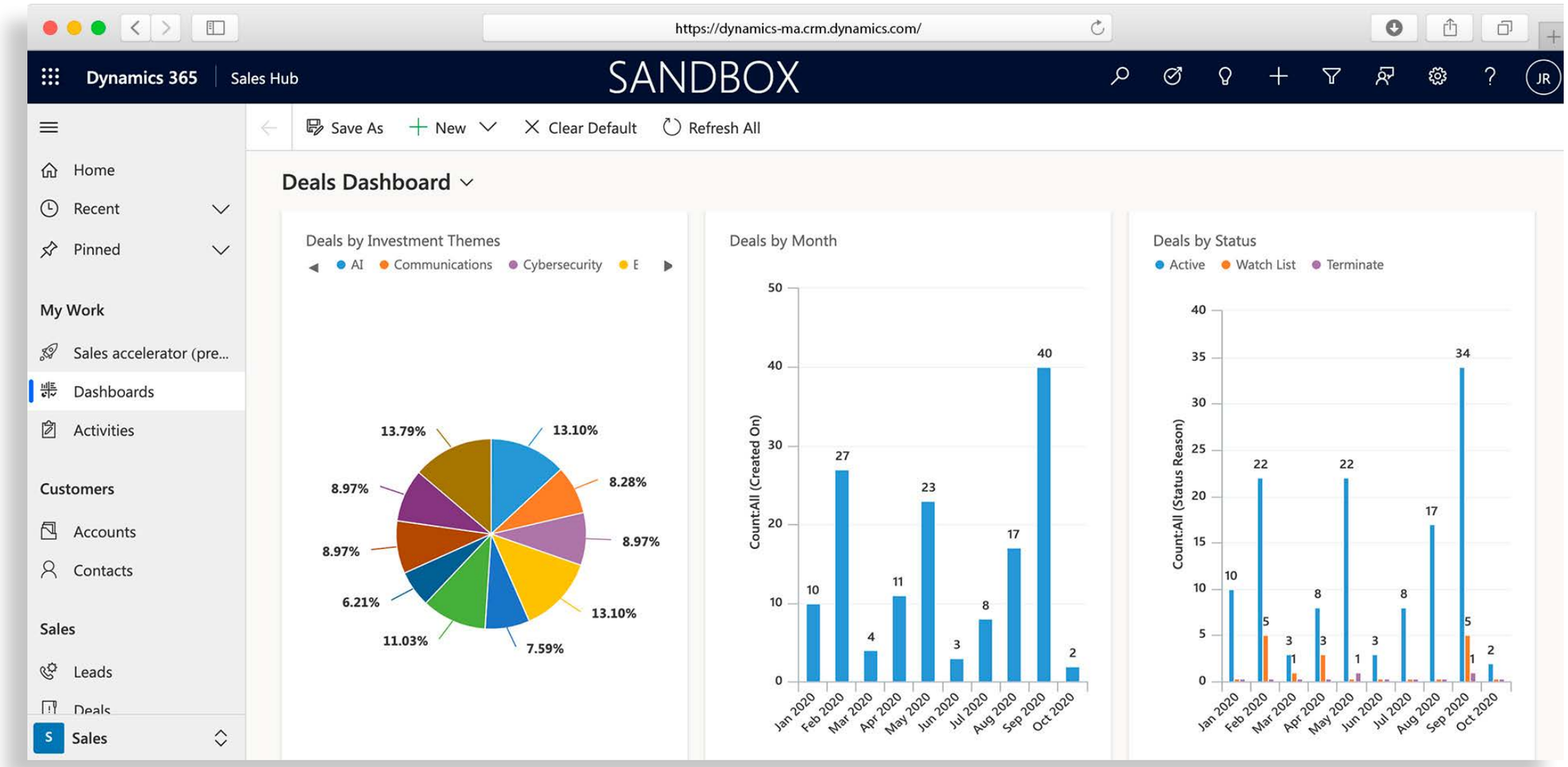
Dynamics 365
Sales Hub
SANDBOX
JR
Save As
New
Clear Default
Refresh All
Home
Recent
Pinned
My Work
Sales accelerator (pre...
Dashboards
Activities
Customers
Accounts
Contacts
Sales
Leads
Deals
Sales
Deals Dashboard
Deals View for Chart
Expand Chart
Deals by Industry
Count:All (Industry)
100
80
60
40
20
0
(blank)
Vehicle Retail
Deals View for Chart
Expand Chart
Deals by Stages
(blank)
Durable Manufacturing
Active
Watch List
Terminate
Status Reason
Deals View for Chart
Expand Chart
Deals by Value
(blank)
$100K-$300K
$300K-$500K
0.69%
13.79%
15.86%
19.31%
16.55%
11.72%
22.07%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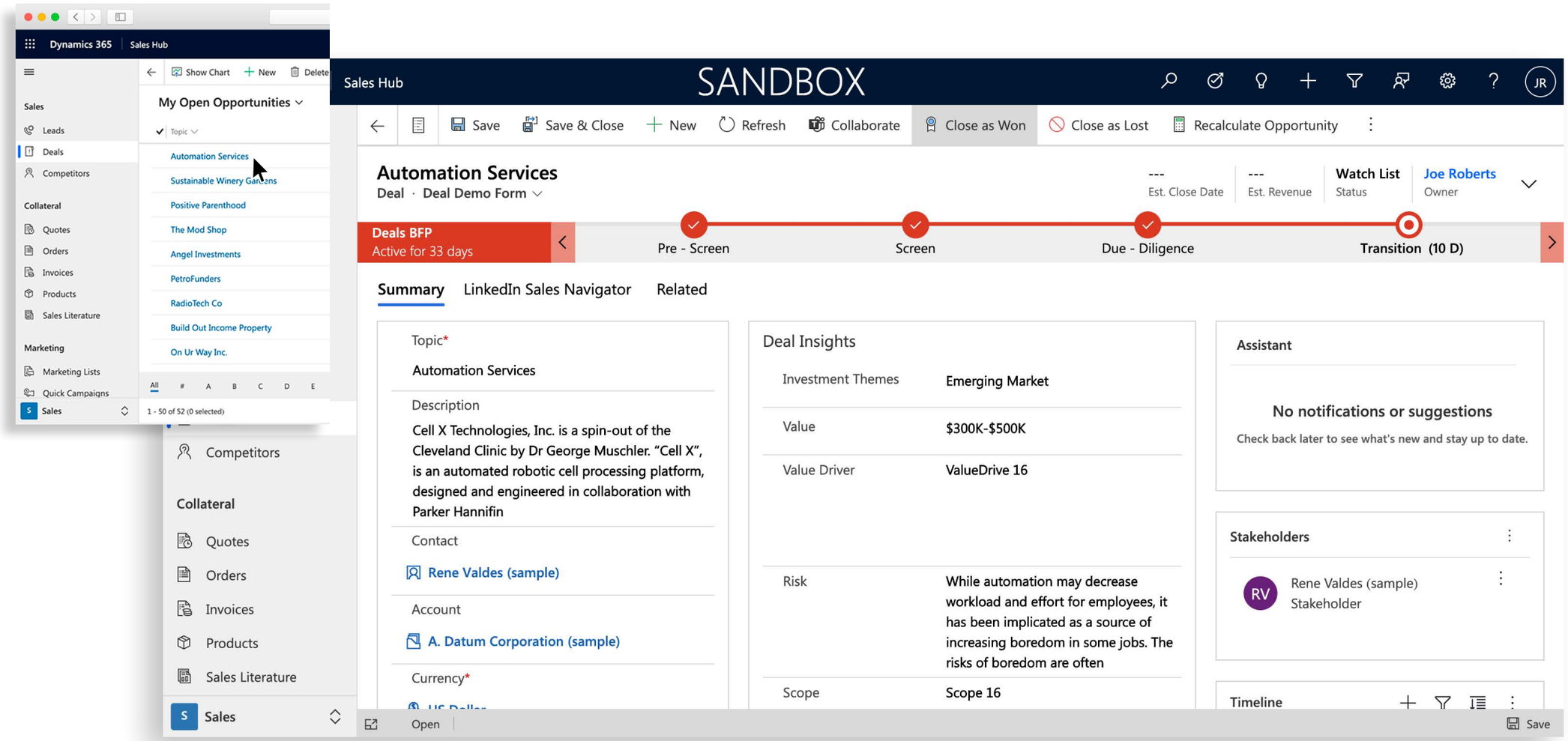
Dashboards
Activities
Customers
Accounts
Contacts
Sales
Leads
Deals
Sales
Deals Dashboard
Deals by Investment Themes
AI
Communications
Cybersecurity
13.10%
8.28%
8.97%
13.10%
7.59%
11.03%
6.21%
8.97%
8.97%
13.79%
Deals by Month
Count:All (Created On)
10
27
4
11
23
3
8
17
40
2
Jan 2020
Feb 2020
Mar 2020
Apr 2020
May 2020
Jun 2020
Jul 2020
Aug 2020
Sep 2020
Oct 2020
Deals by Status
Active
Watch List
Terminate
Count:All (Status Reason)
10
22
5
3
1
8
3
22
1
3
8
17
5
1
34
2


Dynamics 365
Sales Hub
Show Chart
New
Delete
Sales
Leads
Deals
Competitors
Collateral
Quotes
Orders
Invoices
Products
Sales Literature
Marketing
Marketing Lists
Quick Campaigns
Sales
My Open Opportunities
Topic
Automation Services
Sustainable Winery Gardens
Positive Parenthood
The Mod Shop
Angel Investments
PetroFunders
RadioTech Co
Build Out Income Property
On Ur Way Inc.
All # A B C D E
1 - 50 of 52 (0 selected)
Sales Hub
SANDBOX
JR
Save
Save & Close
New
Refresh
Collaborate
Close as Won
Close as Lost
Recalculate Opportunity
Automation Services
Deal · Deal Demo Form

Est. Close Date

Est. Revenue
Watch List
Status
Joe Roberts
Owner
Deals BFP
Active for 33 days
Pre - Screen
Screen
Due - Diligence
Transition (10 D)
Summary
LinkedIn Sales Navigator
Related
Topic*
Automation Services
Description
Cell X Technologies, Inc. is a spin-out of the Cleveland Clinic by Dr George Muschler. "Cell X", is an automated robotic cell processing platform, designed and engineered in collaboration with Parker Hannifin
Contact
Rene Valdes (sample)
Account
A. Datum Corporation (sample)
Currency*
Deal Insights
Investment Themes
Emerging Market
Value
$300K-$500K
Value Driver
ValueDrive 16
Risk
While automation may decrease workload and effort for employees, it has been implicated as a source of increasing boredom in some jobs. The risks of boredom are often
Scope
Scope 16
Assistant
No notifications or suggestions
Check back later to see what's new and stay up to date.
Stakeholders
RV
Rene Valdes (sample)
Stakeholder
Timeline
Open
Save

01 CASE STUDY FORTUNE 100 COMPANY

PROBLEM OVERVIEW

A company that invests in emerging technologies across a range of industries faced the following challenges:

Disorganized customer data and no analytics

Documents were all over the place; people kept important information in personal storage, multiple SharePoint sites, different OneNote notebooks, and scattered attachments.

Issues staying connected

Documents were all over the place; people kept important information in personal storage, multiple SharePoint sites, different OneNote notebooks, and scattered attachments.

Trouble finding & following prospects

The team spent too much time with manual tasks; Salesforce was unused; information was challenging to find and not visible for decision-makers.

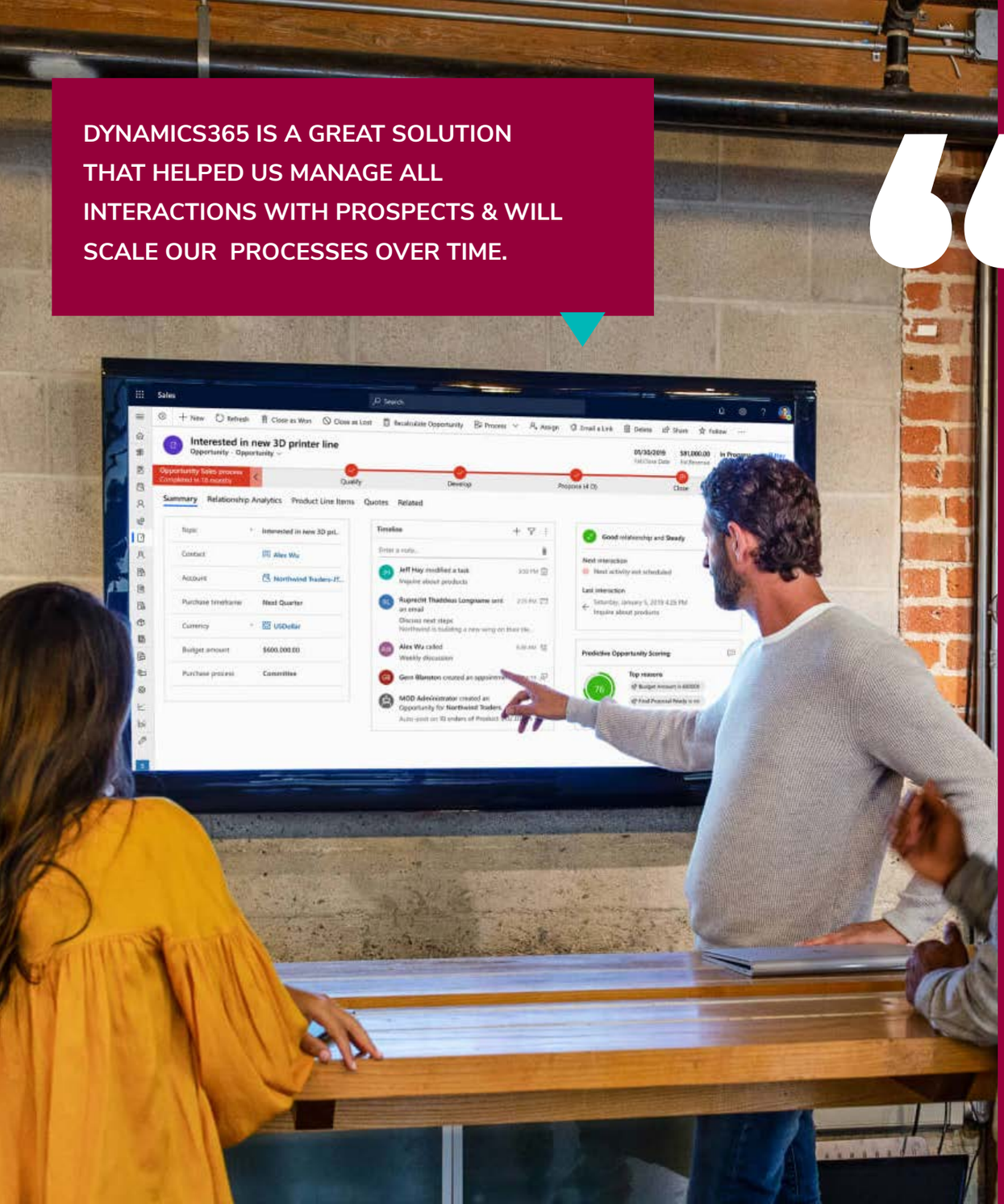
SOLUTION

Implementation of Dynamics 365

Through a centralized repository and process for prospects and opportunities with a customized Dynamics 365 implementation, opportunities get assigned to specific team members, improving communication and tracking. Dynamics 365 enables metrics and reports that further help in closing those opportunities.

MAIN BENEFITS

- Automation of everyday tasks.
- Greater efficiency for multiple teams.
- Improved analytical data and reporting.
- Automate forecasting for business performance.
- The company saved 50% to 60% of time with Power BI.



DYNAMICS365 IS A GREAT SOLUTION THAT HELPED US MANAGE ALL INTERACTIONS WITH PROSPECTS & WILL SCALE OUR PROCESSES OVER TIME.

PEOPLE ARE SAVING 15-20% OF THEIR TIME BY IMPLEMENTING AUTOMATED PROCESSES AND TRACKING GOALS

FORTUNE 100 COMPANY

DEFINITY FIRST