A Holistic Salesforce Solution For Your Private Equity Fund

Salesforce is much more than a contact management / investor management system. With built-in AI and workflow capabilities, Salesforce supports your deal team's ability to quickly assess investment opportunities. With more than 15 years of industry expertise, FinServ has put together a preconfigured version of Salesforce to meet all the needs of a Private Equity fund. Our solution supports your Deal Teams, Marketing & Sales, IR, Operations and Accounting teams.

Providing Marketing & Sales with a Competitive Advantage

FinServ provides support for prospect acquisition and automated marketing campaigns and ensures a seamless integration between Salesforce's industry leading Pardot marketing platform and the Salesforce CRM system.

We also help you take advantage of the latest Artificial Intelligence functionality (Salesforce Einstein) built right into the Salesforce platform. This enables Salesforce to notify your team when a prospect is ready to invest, which takes the guesswork out of manually combing through investor data and results in time savings. We also customize the platform to help you to meet key GDPR and SEC compliance requirements.

- Customized Lead nurturing campaigns with automated Lead scoring and actions
- Integration with Preqin, Pitchbook, SPS and others
- Custom Landing Pages, Intelligent Email Templates, Automated Unsubcribe / Resubscribe
- Executive level Dashboards providing clear views of Marketing & Sales performance

A Holistic 360-degree view of the Investor

Your IR team needs a world-class user interface that makes it easy to find all investor information for your fund in one place. Whether you are pulling up investor documents, checking the latest capital call and distribution notces or other previous interaction, it is imperative to get to this information as efficiently as possible, eliminating unnecessary clicks and navigation. To achieve this goal, FinServ has created a Private Equity Fund skin in Salesforce that provides the following key features:

- Provide up to the minute Investor Holding /Transfer Agent Reports
- Key tax lot and other key investor breakdowns
- Instant access to all Investor correspondence including document tracking
- Management & Performance Fee Reporting by Investor
- Committed Capital Reporting
- Tax lot and other key investor breakdowns

Using AI to Analyze Deal Data Quickly

Salesforce is one of the few platforms that combines true AI capabilities with an industry leading software as a service (SaaS) model. Avoid spending millions of dollars to build your own AI platform by leveraging the Salesforce Einstein AI platform. PE funds can employ the latest AI technology to identify the best deals through machine learning and sophisticated algorithms. Ensure your deal sourcing team has the best tools to guarantee you put your investment dollars to work quickly with Salesforce.

About FinServ Consulting

FinServ Consulting is a Salesforce SI Partner with unparalleled expertise in Alternative Asset Management and provider of business consulting, systems development, and integration services. Founded in 2005, FinServ delivers customized world-class business and IT consulting services for the front, middle and back office, providing alternative asset managers with optimal and first-class operating environments to support all investment styles and future asset growth.

SALESFORCE CERTIFIED
Sales Cloud Consultant

SALESFORCE CERTIFIED
Pardot Specialist

SALESFORCE CERTIFIED
Einstein Analytics and Discovery Consultant

FinServ CONSULTING

insight | vision | experience

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