

CRM solution for M&A

A WORD FROM THE FOUNDER

As the digital transformation of sales processes becomes the industry standard, M&A firms require a CRM solution which encompasses all their business requirements.

At AskLogix, our CRM expertise can transform your current system, by combining M&A deals and activities in one place, identifying opportunities and automating/tracking activities. This overview outlines what we can provide to give you a digital edge over your competitors.

Get in touch today, I would be happy to assist you in your digital projects.



Arnaud Mercier,
Founder & CEO



WHAT WE DO

Asklogix - M&A is a collaboration and productivity cloud-based solution designed specifically for Merger and Acquisition firms.

Bringing together the Client Relationship Management, Sales & Marketing and Operational functions across a business, our solution **automates workflows, facilitates collaboration and optimises your operations for growth.**

Our solution supports sales and marketing efforts required to find new business and allows you to manage your deals and activities in one location.

KEY BENEFITS

- **Summarise** opportunities, transaction expenses and activities efficiently
- **Facilitate Team Collaboration** - the right information to the right user at the right time - securely!
- **Automate workflow processes** for enhanced productivity and reduction of operation risks
- **Highly configurable platform** adapted to the needs of your operations, the growth of your business and changes in the regulatory environment.

SUPPORTED PROCESSES

- Forecast potential new business
- Fundraising
- Manage deal interactions and progress
- Provide updates to your clients and close deals faster
- Organise one-to-one meetings, client visits and call reports (follow-up)
- Marketing automation
- Due Diligence and RFP
- Events and meetings
- Client delivery and Solvency requests
- Lead management
- Contacts and document management
- Synchronise e-mails, contacts and calendars with Outlook, Gmail
- Risk and Compliance (CRM)

KEY FEATURES PROVIDED



Solution based on AI & Blockchain technologies

Our embedded **Blockchain extends CRM** - delivering a fast and easy way to build trusted partner networks that share verified, distributed data.

Our solution powered by AI can help users with smart recommendations about a customer or a prospect based on all the data about that person the system has collected.



Automated client Communications & Collaboration

The incorporation of a **branded portal** enables the client to differentiate their reporting, while extending your brand from simple relationship building to high-touch client engagement.

Prospects, investors and their consultants can now all go to a single portal/dashboard and with one login review, manage and produce reports across all entitled funds and accounts.



Compliance and Risk Management

The increasingly rigorous regulatory climate requires new levels of transparency and compliance.

Our solution incorporates a sophisticated Risk and Compliance Management environment, which not only captures all elements of risk via consolidation of disparate data sources, but also **actively predicts** the likely future outcomes.



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