

TECHNOLOGY SERVICES

SALESFORCE HEADSTART FOR PRIVATE EQUITY

ACCELERATING SALESFORCE IMPLEMENTATION FOR PRIVATE EQUITY FIRMS

A TURNKEY PRIVATE EQUITY SOLUTION BUILT ON SALESFORCE

Private Equity HEADSTART by Sikich is designed to help PE firms streamline operations and enhance efficiency with a ready-to-use Salesforce solution. Built on Sales Cloud, this accelerator supports the full investment lifecycle with a robust suite of features tailored to the unique needs of private equity firms.

KEY FEATURES & BENEFITS

- ✓ **Comprehensive Data Management** – Leverage key custom objects to track and manage critical investment data, including Deals, Funds, Committed Capital, Capitalization, Financial Results, Investment Structure, and Account Deal Investors.
- ✓ **Efficient Deal & Fund Tracking** – Dedicated tabs for deal tracking, fund management, and time allocation ensure smooth navigation and organization.
- ✓ **Powerful Automation** – Streamline processes with automated workflows for deal team collaboration, fundraising naming conventions, and capital commitments.
- ✓ **Advanced Reporting & Dashboards** – Gain deep insights with 35+ reports covering deal performance, fundraising progress, and fund analytics. Interactive dashboards help visualize key metrics for data-driven decision-making.

BUILT FOR SPEED & COST EFFICIENCY

Private Equity HEADSTART is designed to help firms implement Salesforce quickly and efficiently at a fraction of the cost of custom-built solutions. Unlike traditional implementations that require significant development time, our pre-built solution is ready to deploy, saving time and resources.



Rapid Deployment – Get up and running quickly with a pre-configured setup tailored for private equity firms.



Affordable Implementation – A cost-effective solution that provides quick ROI.



Proven Framework – Developed based on best practices, ensuring a scalable and robust foundation for your firm's operations.

WHY CHOOSE SIKICH?

Sikich's Private Equity HEADSTART sets itself apart by offering a pre-built and industry-specific solution that drastically reduces implementation time. While other firms build from scratch, we deliver a ready-made system that allows firms to focus on growth rather than system development.

GET STARTED TODAY

Accelerate your private equity firm's digital modernization with Private Equity HEADSTART. [Contact us](#) to learn how you can implement Salesforce quickly and cost-effectively.

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