



Venture Capital Accelerator

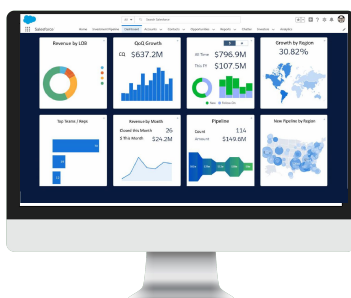
Deal pipeline and portfolio management

What would you give for a consolidated view of fundraising, investment deals and portfolio companies? Manage relationships, automate tasks, collaborate in real-time, leverage analytics and take action directly from your phone. Our preconfigured Venture Capital solution provides your deal teams, partners and portfolio operations with the data they need to reliably find, close, manage and service your LPs and investments, no matter the context.



PIPELINE MANAGEMENT

- 360 Degree view of companies & contacts
- Manage fundraising campaigns and deals
- Track potential investments on a watchlist
- Full deal tracking, management & reporting



PORTFOLIO MANAGEMENT

- Manage Mark to Market valuations, impairments and exits
- Track investment, fund and portfolio IRR and carry value
- Collaborate with colleagues and take action right from interactive dashboards

“Our pre-configured solution gives you all the power and flexibility of the Salesforce platform with the speed of implementation and certainty of a productized offering. Get the core features you need now and the freedom to configure what is important and unique to your organization.”

Aaron Zuccolin
Financial Services Practice Lead,
Traction on Demand





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Implementation Details & Pricing

IMPLEMENTATION

INSTALLATION

- Salesforce org setup
- Solution package installation
- Einstein Analytics package installation

ELABORATION

- Identify configuration for included fields, stages, labels & company branding
- Security & permissions settings

CONFIGURATION

- Customization of field data and user interface
- Security configuration of users, roles and permissions

DEPLOYMENT

- Deployment of custom configurations to production environment

TRAINING & GO-LIVE

- End user training
- Knowledge transfer to administrator



ESTIMATED TIMELINE

4-6 Weeks

ESTIMATED COST *

\$50,000

* Costs include install and configuration of the accelerator in a new Salesforce instance. Data migration, integrations and customizations are available via a services engagement

Additional solution features available for investor and portfolio company portals, document generation automated marketing communications.

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