

DYNAMO SOFTWARE

# Fundraising with Mobile Applications



Fundraising success for private equity firms relies on relationship management and establishing a trustworthy reputation. Creating this “personal equity” requires constant communication with clients and prospects, which includes travel for face-to-face meetings. Access to timely, critical information can determine fundraising success when the team is on the road. Mobile applications enable you to merge your front office with your prospect’s boardroom, and provide comprehensive investment intelligence that secures the investment.

## Stay Aware of Context

Personalization is crucial to a fundraising pitch. Mobile applications empower you to consolidate investors’ profiles on the road with information such as investment preferences, history, expectations, and their typical due diligence process. As mobile technology begins to rival the functionality of in-office systems, the ability to travel light and fast while retaining access to critical information is achievable, and gives you a competitive edge.

The complexities inherent within the private equity industry provide a unique challenge to typical CRM systems. Your mobile app should enable aggregation of information including relevant contacts, activities, and documentation within a single dashboard. Mobile app users should be able to add and update data and reflect the changes in real-time. Providing secure global access to the same data ensures everyone maintains an organized and informed communications pipeline.

# Meet Unexpected Fundraising Challenges

Front-office mobile apps allow users to quickly respond to ad hoc challenges. These apps provide click-to-call functionality directly within the user interface, which enables immediate access to relevant contacts. Access to a centralized database on their mobile devices also assists fundraising teams with planning travel routes and maximizing the team's ability to build strong client relationships on the road.

Complete access to all prospect information from a tablet or smartphone is also an advantage during meetings with clients and prospects. Answers to questions can be supported by downloading relevant content and sharing it on your screen, which further enhances the perception of your firm's readiness and responsiveness.

## Differentiate Your Data

Institutional investors seek fund managers that exhibit proven track records, key points of differentiation, and industry leadership. Building a database of validated portfolio financial data creates a powerful point of separation that until the 2008 crisis was largely under-utilized. However, given a growing assemblage of technologies, fund managers and their deal teams can now effortlessly build a library of portfolio performance spanning from fund inception through exit. Private equity investors can now drastically economize fundraising preparation by eliminating the inefficiencies associated with data gathering and reporting, and capitalize on the consolidated knowledge base through mobility. Data libraries offer the ability to interact with investment data via ancillary technology and specialized mobile apps. While in the past, collecting private company data was opaque and cumbersome, today, full financial statements and KPIs can be made readily available anytime and anywhere.

## Built for the Boardroom

Given the sophistication and intricacy of private equity transactions, mobile technologies must present intelligible insight without distractions. Portfolio companies require separate dashboards containing financial statements, charts, and KPIs for concise organization and unfettered access. The data driving these features should not only be updated in real time, but notify users when new data is available. Regardless of the technology access point, users should be able to create, edit, and save commentary to form a consistent flow of information across the entire firm. With this level of functionality, private equity investors would access their portfolio data and reporting anywhere from a phone or tablet. By connecting a private company database to mobile devices, insight is no longer limited to static reporting packages and spreadsheets. Rather, web-connectivity, and configurable interfaces enable fund managers to present performance in newly accessible ways.

## Exceed the Standard

Smartphones and tablets have become an integral component of professional communications and management. Applications dedicated to the private equity market empower firms to capitalize on the intelligence and flexibility offered by mobility, and provide differentiation in an industry where transparency plays a large role. A culture of continuous innovation is a hallmark of effective brand-building. Utilizing emerging technologies to open doors to unique insights and exceptional performance crafts a powerful voice in the private equity industry.

### About Dynamo Software, Inc.

Dynamo Software's mission is to be the leading global, end-to-end cloud software platform for the alternatives ecosystem, serving the information sharing and analytical data needs of our constituents. Since 1998, the company has been providing industry-tailored, highly-configurable investment management, reporting and data management cloud software solutions to the global alternative investment industry. Dynamo's cloud-based solutions serve the private investment landscape including: private equity and venture capital funds, real estate investment firms, hedge funds, endowments, pensions, foundations, prime brokers, fund of funds, family offices, and fund administrators. The Dynamo™ platform has improved the productivity of fundraising, deal management, research management, investor servicing, portfolio management, and compliance teams worldwide. Dynamo has a global footprint with operations across the US, UK, Continental Europe, and Asia. For more information, please visit [www.DynamoSoftware.com](http://www.DynamoSoftware.com).

- Founded in 1998
- 1,000+ global clients
- \$10T client AUM

