

# When Every Deal Counts, You Can Count on Dynamo Deal Management.

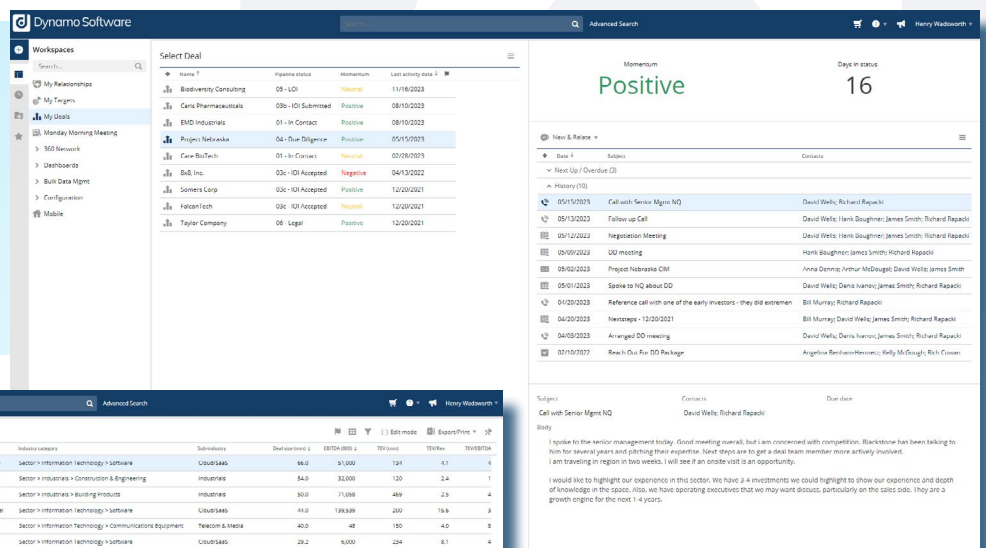
## Unlock the Potential of Your Deal Pipeline Today

You need to make the right moves, at the right time. To do so, you and your team need a robust CRM and deal management software built specifically for the unique needs of investing in alternatives.

Dynamo Software recently surveyed more than 100 leading General Partners (GPs). These GPs indicated that the #1 tech for them to focus on within the next 12 months is CRM/Deal Management software. In order to deliver the most successful outcomes, it's critical for today's modern GPs to properly manage the deals they have and optimize existing investment workflows. And, that's where Dynamo can help.

With Dynamo, you can track your communications, research, opportunities, relationships, and progress all in one place for real-time insights into the deals that fuel your firm.

Leverage Dynamo's indicators to instantly understand deal momentum and the status, along with next steps, and how to close more deals faster.



The screenshot displays the 'Select Deal' interface with a table of deals and a detailed view of a deal with a 'Positive' momentum score of 16.

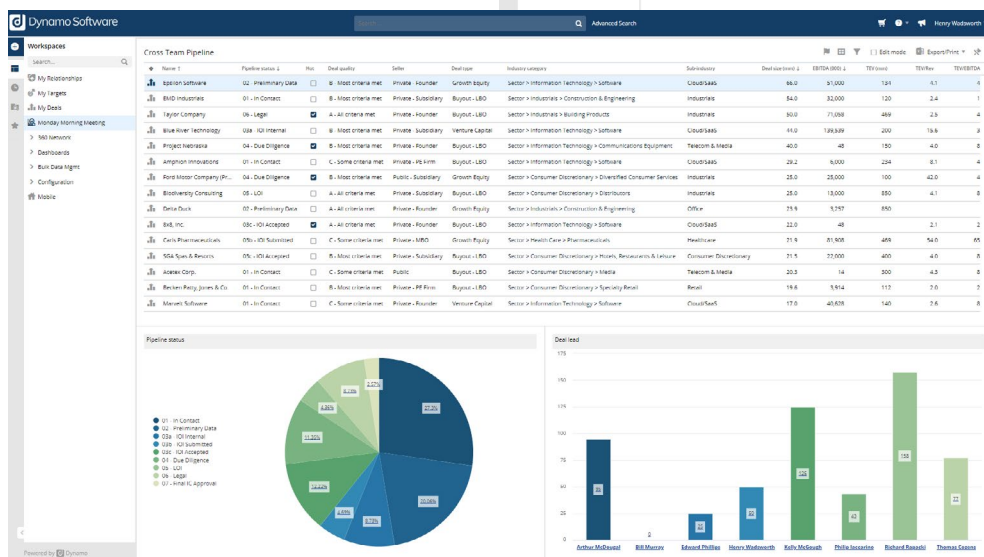
Name	Pipeline status	Next action	Last activity date
Biodiversity Consulting	05 - In Contact	Neutral	11/16/2023
Care Pharmaceuticals	03b - ICI Submitted	Positive	08/10/2023
BMD Industrials	01 - In Contact	Positive	08/10/2023
Project Nebraska	04 - Due Diligence	Positive	05/15/2021
Care BioTech	01 - In Contact	Neutral	03/28/2021
Bill, Inc.	03c - ICI Accepted	Negative	04/13/2022
Somers Corp	03c - ICI Accepted	Positive	12/20/2021
FalconTech	03c - ICI Accepted	Neutral	12/20/2021
Taylor Company	06 - Legal	Positive	12/20/2021

**Momentum: Positive 16**

**Days in status: 16**

**History (10)**

- 05/15/2023 Call with Senior Mgmt HQ
- 05/17/2023 Follow up Call
- 05/19/2023 Negotiation Meeting
- 05/20/2023 ICI meeting
- 05/01/2023 Spin to HQ about DD
- 05/01/2023 Reference call with one of the early investors - they did extremely well
- 04/20/2023 Newspress - 12/20/2021
- 04/09/2023 Arranged DD meeting
- 03/10/2023 Reach Out For DD Package



The screenshot displays the 'Cross Team Pipeline' view with a table of deals and a 'Pipeline status' pie chart.

Name	Pipeline status	Deal type	Seller	Deal type	Industry category	Subindustry	Deal size (\$)	TEV (\$)	TEV Rev	TEV BETA
Epison Software	02 - Preliminary Data	B - Meet criteria met	Private - Founder	Growth Equity	Sector - Information Technology - Software	CloudSaaS	88.0	3,100.0	131	6.1
BMD Industrials	01 - In Contact	B - Meet criteria met	Private - Subsidiary	Buyout - LBO	Sector - Industrials - Construction & Engineering	Industrials	84.0	32,000	120	2.4
Taylor Company	04 - Legal	A - All criteria met	Private - Founder	Buyout - LBO	Sector - Industrials - Building Products	Industrials	80.0	71,089	489	2.8
Blue River Technology	03a - ICI Internal	B - Meet criteria met	Private - Founder	Venture Capital	Sector - Information Technology - Software	CloudSaaS	61.0	128,839	200	19.4
Project Nebraska	04 - Due Diligence	B - Meet criteria met	Private - Subsidiary	Buyout - LBO	Sector - Information Technology - Communications Equipment	Telecom & Media	40.0	48	150	4.0
Amphion Innovations	01 - In Contact	C - Some criteria met	Private - Vcs firm	Buyout - LBO	Sector - Information Technology - Software	CloudSaaS	29.2	8,000	234	8.1
Ford Motor Company (P)	04 - Due Diligence	B - Meet criteria met	Public - Subsidiary	Growth Equity	Sector - Consumer Discretionary - Diversified Consumer Services	Industrials	28.0	28,000	100	42.0
Biodiversity Consulting	06 - Legal	A - All criteria met	Private - Founder	Buyout - LBO	Sector - Consumer Discretionary - Diversified Consumer Services	Industrials	28.0	18,000	850	4.1
Delta Duck	02 - Preliminary Data	A - All criteria met	Private - Founder	Growth Equity	Sector - Industrials - Construction & Engineering	Office	25.9	5,787	850	
Bill, Inc.	03c - ICI Accepted	A - All criteria met	Private - Founder	Growth Equity	Sector - Information Technology - Software	CloudSaaS	22.0	48	100	2.1
Care Pharmaceuticals	03b - ICI Submitted	C - Some criteria met	Private - MktD	Buyout - LBO	Sector - Health Care - Pharmaceuticals	Healthcare	21.9	81,908	408	54.0
USA Spas & Benches	05a - ICI Accepted	B - Meet criteria met	Private - Subsidiary	Buyout - LBO	Sector - Consumer Discretionary - Hotels, Restaurants & Leisure	Consumer Discretionary	21.9	20,000	400	4.0
Adeco Corp.	01 - In Contact	C - Some criteria met	Public	Buyout - LBO	Sector - Consumer Discretionary - Media	Telecom & Media	20.3	14	300	4.3
Becken Papp James & Co	01 - In Contact	B - Meet criteria met	Private - PE Firm	Buyout - LBO	Sector - Consumer Discretionary - Specialty Retail	Retail	18.8	1,914	112	3.0
Marsart Software	01 - In Contact	C - Some criteria met	Private - Founder	Venture Capital	Sector - Information Technology - Software	CloudSaaS	17.0	48,878	540	3.8

**Pipeline status**

**Deal lead**

Bar chart showing deal lead values for various team members: Arthur McDowell (100), Bill Murray (2), Edward Phillips (25), Henry Westworth (25), Kelly McDougall (145), Phila Goodson (25), Richard Rapacki (145), Thomas Coates (25).

Gain a comprehensive view of your deal pipeline to capitalize on time and resources to fuel the close.

# Keys to Closing More Deals with Dynamo

## 1 Build Stronger Relationships



- Create a robust intelligence network with Dynamo.
- Track relationships across companies, contacts, bankers, and more, empowering you with valuable insights into your deal network.
- Leverage Dynamo's engagement-based indicators to capitalize on your relationships
- Monitor referrals, deal sourcing with bankers, intermediaries, and industry experts within the platform.
- Automatically relate entities with Dynamo AI.

## 2 Source Higher-Quality Targets



- Access Pitchbook, Preqin, Traxcn, CapIQ, FactSet, and more to enrich your deal management process.
- Integrations with Outlook and Gmail streamline communication, while Microsoft Office document integration simplifies document management.
- Harness the power of Content Dynamo for in software company and contact data.
- Stay updated with relevant news, ensuring you never miss an opportunity.
- Open API allowing integration with other 3rd party data sources, software's, and data warehouses.

## 4 Close More Deals... Faster



- Experience a seamless deal creation process with Dynamo: effortlessly generate deals from various sources, including email providers and web forms.
- Dynamo's automated task management and reminders keep your team on track and ensure critical milestones are never missed.
- Leverage Dynamo's momentum-based indicators to drive data-driven decision making and accelerate deal close.

## 3 Drive Deeper Analysis



- Dynamo provides powerful dashboarding tools to help you visualize and analyze your deal data.
- Access best-practice dashboard libraries and collaborate effectively with team workspaces.
- Enjoy the flexibility of ad-hoc data interrogation and create custom views using Dynamo's proprietary advanced search capability.
- Dive deep into deal profiles with widget-driven key metrics and analytics, empowering you with actionable insights.



## Anywhere, Anytime Access with Dynamo Mobile

- Manage deals and stay connected with your team, no matter where you are.
- An interactive dashboard empowers users to a snapshot of key information while drilling into any subset of data including Activities, Companies, Contacts, Deals, Tasks, and Documents.
- Enhanced mobile integration enables users to easily email, text or call their investors and fund managers, log activities into Dynamo, get driving directions, or view contacts and companies nearby.

View the Dynamo Mobile brochure [here](#).

## Awards & Recognition



**Dynamo Software**  
Best Alternative Investment Management  
Fintech Company 2023



## About Dynamo Software, Inc.

Dynamo gives alternatives investors a Performance Edge, empowering them to efficiently scale their firm to capitalize on the growing wave of private market opportunities. With the **Dynamo Alternative Investment Platform**, investors can now run a tightly integrated firm, putting all their data to work to accelerate operations across front, middle, and back office, unleashing teams to work smarter, and allowing leaders to make better investment decisions and scale their firm. Dynamo has a global footprint with operations across North America, EMEA, APAC, and UAE. For more information, please visit [DynamoSoftware.com](https://DynamoSoftware.com).

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



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