

# Dynamo CRM & Fundraising

Here's how Dynamo can empower General Partners to build better relationships and increase their fundraising pipeline:

## Network Building & Relationship Tracking

- Dynamo's core CRM functionality enables seamless tracking of investor communication
- Enhance note taking efficiency with Dynamo AI auto-tagging and activity summaries
- Seamlessly synchronize emails with Outlook and Gmail add-ins
- Track relationships spanning investors, contacts, and their investment preferences, providing valuable insights into your fundraising network
- Access Pitchbook and Preqin from within Dynamo to prospect new investors as well as populate your own investor record

## Marketing & Investor-based Communication

- Efficiently engage with your investor network with Dynamo Mailing Campaigns
- Design campaigns using integrated formatting tools and merge fields
- Monitor campaign success metrics, including email opens, link clicks, and document downloads
- Simplify management of your fundraising events & road trips with Dynamo's event management features

## Fundraising & Pipeline Building

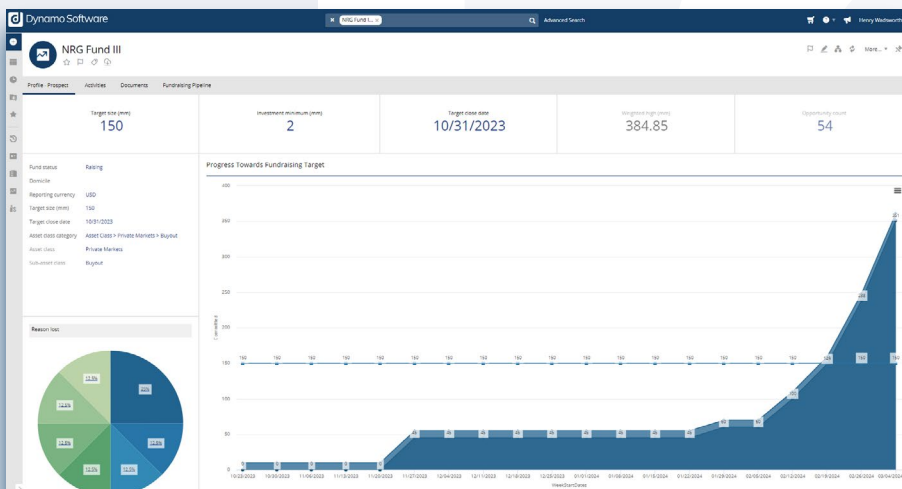
- Centralize key investor documents – PPMs, NDAs, and Subscription Docs
- Tailor fundraising outreach with detailed investor preferences
- Build a precise fund pipeline, monitoring commitment potential, pipeline stages and win / loss data
- Dynamo's automated task management and reminders keep your team on track, ensuring critical fundraising steps are not missed
- Leverage automated analytics and dashboarding for data-driven decision making

## Investor Onboarding & Fundraising Portal

- Seamlessly integrated CRM & Fundraising features with Dynamo's Investor Portal
- Bring investors along a dynamic onboarding in a new era of data room experience
- Market investment opportunities across both funds, direct deals, and co-investments
- Streamline document signing with Dynamo's DocuSign integration
- Enable secure two-way communication and flexible web forms for data capture



View the **Dynamo Investor Relations & Portal** brochure here.



Dynamo's Integration Ecosystem enables your firm to connect to other data sources — without having to do any coding.