

Dynamo & Corten Real Estate | From Manual to Masterful

How Corten Real Estate Transformed Investment Operations with Dynamo Software

About Corten Real Estate

Corten Real Estate is a private investment manager specializing in middle-market equity and mezzanine debt investments across the United States. With a focus on tailored capital solutions, Corten leverages its sector expertise to assist operating partners and sponsors in executing value-added business plans while addressing financial and operational challenges.

The Challenge

Corten faced significant challenges with their incumbent software, which was lacking flexibility and automation, leading to extensive manual workarounds. Managing contacts became challenging due to numerous duplicate records. Inadequate import functionality and poor reporting capabilities hindered their ability to generate active investor and pipeline reports. This limited their capacity to engage in data-driven decision-making that could fuel strategic growth.

The Discovery of Dynamo

Based on strong recommendations from industry peers, Corten conducted an extensive nine-month due diligence process for the right **real estate investment platform**, evaluating **Dynamo Software** alongside other competitors. This involved conducting several meetings and presentations with the Dynamo team to showcase how the platform could effortlessly integrate and enhance marketing and investor relations workflows.

> *Dynamo stood out more than other systems because of its efficient, end-to-end design, user-friendly reporting capabilities, Outlook add-in, and attractive user interface.*

The Evaluation Process

For their evaluation, Corten conducted a comprehensive review of several other CRMs, including a diverse range of platforms and proprietary systems developed by well-known companies in the industry. However, Dynamo stood out among the competitors in four key ways:

1. **End-to-End Platform |** Cloud-based, automated, and versatile platform with modules for various investment management needs that work seamlessly together.
2. **Integration |** Streamlined connectivity with several investment data sources, along with mailing and calendar platforms.
3. **Configurable and User-friendly Interface |** A highly configurable platform with a secure, modern, user-friendly, and extremely intuitive interface for creating reports and dashboards.
4. **Reporting Capabilities |** Efficient reporting with real-time data access and ease of sharing and distributing key analytics.

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Why Dynamo

Corten has adopted Dynamo's CRM as its foundational system for Fundraising, Investor Relations, and for managing communications through Dynamo's Investor Portal. They valued Dynamo's capabilities around fundraising and contact management, which aligned to their strategic business needs to improve their outreach and communication efforts to their clients. Corten anticipated that Dynamo's data migration workflow process would significantly reduce potential data redundancy and therefore contribute to significant time-savings.

- **Configurability /Dashboard |** Dynamo's platform is interactive and highly configurable, and with many off-the-shelf reporting libraries, the dashboard provides streamlined access to performance data and analytics.
- **Enhanced Document Management |** Automation of key processes such as document management, investor communication, and reporting, minimized manual intervention.
- **Robust De-duplication Tool |** The advanced de-duplication feature helps maintain a clean and organized contact database, fostering more actionable and accurate data.
- **Marketing Automation |** Secure and personalized communications integrated into Dynamo, with features for creating and managing mailing lists and campaigns, facilitating bulk email sends, and allowing "send on behalf of" options to streamline processes and boost efficiency.
- **Comprehensive Real-time Reporting |** Integration with SSRS, Highcharts, and Microsoft PowerBI provided interactive and highly visual reporting. Integration with several data sources such as Preqin, will provide real-time data for analysis and quicker reporting.



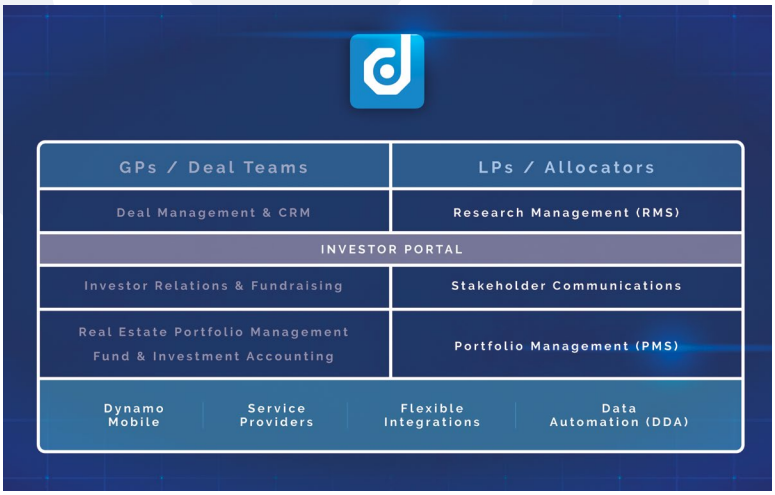
Streamline Investor Relations, Boost Fundraising, & Simplify Data Integration

Dynamo's scalable Real Estate Investment Management Platform streamlines investor relations, enhances fundraising, and integrates data effortlessly with intuitive dashboards, advanced analytics, and automated reporting.

Download the Brochure

Implementation & Support

Throughout the implementation phase, the consistent weekly support sessions and the collaboration on data migration with their dedicated Dynamo team ensured that their system was meticulously organized, and that data remained clean and accurate. The diligence and responsiveness of the implementation team and efforts resulted in delivering a successful process and a highly optimized platform.



Looking Ahead

Dynamo and Corten have a promising future together, with plenty of room to grow and adapt as the firm's investment management needs evolve. Corten is enthusiastic about the platform's advanced deal management and automation features, including the pipeline manager tool for tracking deal flow and overseeing subscription processes, which enhance the value of Dynamo's robust data capabilities.

Corten views Dynamo as a key strategic partner, dedicated to supporting ongoing operational efficiency, relationship management, and investor communications success.

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.

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

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