



FSConnect

Venture Connect

Venture Connect is centralized solution to track deals and monitor investments and is transferrable across different funds and asset classes. Venture Connect improves collaboration within a firm and makes it easier to track pipeline and portfolio companies. This solution digitizes the user journey for all roles within an investment firm.

FEATURES

Einstein Lead Scoring

Automatically score leads based on historical data and specified criteria such as lead source, project timeline, and funding raised to date

Einstein Next-Best-Action

Use machine learning to make recommendations for context-sensitive actions to improve efficiency, success rate, and data quality

Salesforce Communities

Provide a central portal for Leads and Portfolio companies to communicate on specific records, access and share files, and receive notifications for assigned tasks

Portfolio Analytics

Leverage Einstein Prediction Builder for predictive analytics based on fund performance, Company Snapshots for dynamic financial details on Portfolio companies, and Lead/Deal reports to track pipeline and team performance

Automated Workflows

Automate manual emails, file sharing, and approval processes to improve collaboration and receive customized, automated reminders for pending actions

Mobile Capabilities

Access reports & dashboards, notifications, tasks, contacts, manage meetings, and view Leads/Deals via mobile device to make real-time updates to records within one application, without manual communication.

BENEFITS



Manage all firm operations and communications within a single system



Improve data quality, integrity, and visibility



Track fund performance and opportunities with AI-based analytics



Automate manual meeting scheduling, emails, file sharing, notifications, and approvals

CONTACT

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