



## IMPROVED PRIVATE EQUITY OPERATIONS IN A WEEK!

- **SFDC - CERTIFIED CRM EXPERTS** – with a proven track record of success in Private Equity and Venture Capital firms.
- **COMMITTED RESOURCES** - dedicated to providing the knowledge and care your project deserves.
- **PROVEN QUALITY** – our results speak for themselves. Take a look at the list of selected *SalesLogistix* clients to the right.
- **OBJECTIVE RESOURCES** - we are an independent 3<sup>rd</sup> party serving *your* best interests.

**SalesLogistix**

650 - 326 – 2626

**MANAGING RELATIONSHIPS** with your clients and prospects is crucial for any financial services firm in gaining a competitive edge. As investment targets and LPs have become increasingly savvy, firms need a customer relationship system that facilitates the level of client service that investors have come to expect.

That's why so many Private Equity firms have turned to salesforce.com® to manage their client and LP-facing business processes.

Based on dozens of implementations at investment firms across the US, SalesLogistix has created the **Salesforce for Private Equity** BlackJack package, customizing the Salesforce.com platform to:



**SILVERLAKE**

**Serent**  
CAPITAL

**MIDSPAN**  
PARTNERS

**CMEA**



**MERITECH**  
CAPITAL PARTNERS

**ALTAMONT**  
CAPITAL PARTNERS

- ✓ Streamline data entry
- ✓ Track deals, referrers, intermediaries, LPs, funds, and executives
- ✓ Generate weekly “deal sheets,” deal-flow dashboards, and quarterly analytics
- ✓ Speed user adoption

Designed for firms with fewer than 10 investment professionals, SalesLogistix Blackjack packages address the specific requirements of your firm. Our certified consultants will work with you to develop and tailor solutions that address your problems and accelerate your success. We’re sure that with our implementation packages, one is just right for you and your business.

### **GOLD DEPLOYMENT**

This 48-hour package provides you with a robust start to your salesforce.com deployment. The engagement includes a short BPR session, where we determine exactly what your requirements are for the salesforce.com system. Following the BPR session, our SFDC-certified consultants will ensure that the software is configured to your needs and will assist you in driving your project to meet your defined business objectives. We will configure:

- Contact and Account Management
- Tasks / Action Items (Activity Management)
- Deal Pipeline (Opportunity Management)
- *Investment* and *Fund* Custom Objects
- 8 Reports and a custom Dashboard
- An HTML Template (for Mass Email campaigns)
- Two *brief* training sessions with your users – conducted live or via WebEx

We will also work with your administrators so that we can assure that when we leave, they are trained and understand the configuration as well. All this for an investment of \$14,995\*

### **PLATINUM DEPLOYMENT**

This 54 hour package provides much more value to our customers who are looking to get more operational advantages from salesforce.com. Our Platinum package provides all of the features of our Gold package, plus:

- 2 Custom Objects from the Private Equity configuration
- 2 User-Specific Page Layouts
- 3 Workflow Rules or 3 extra reports / dashboard components
- 2 HTML Mail Templates
- Advanced training for Outlook Integration and System Administrators
- Data Migration of Accounts and Contacts from a single Excel file (up to 1000 records)

All this for an investment of \$19,995\*

**We’re with you all the way.** Many clients need additional features, data migration, system integration, mobile access, and ongoing administration assistance. These capabilities and more are available as optional extensions to our Gold and Platinum packages. SalesLogistix can help you quickly and affordably leverage all the benefits of your salesforce.com system.

\*Plus travel & expenses—see [www.saleslogistix.com/PE.pdf](http://www.saleslogistix.com/PE.pdf) for details.

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