

INVESTOR RELATIONS

MAY 2024

CRM: WEEKLY TRACKER FOR FUNDRAISE

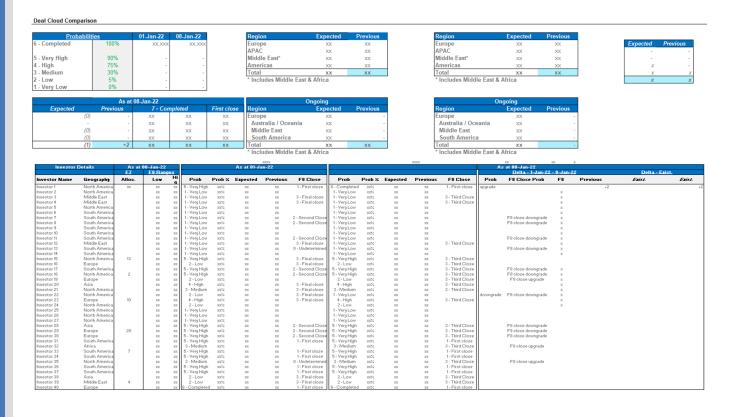


Request and Guidelines Provided

• Prepare and update weekly tracker to observe changes in the client's fundraising process

Methodology and Final Deliverable

- Leveraged data from client's CRM platform to analyze the firm's fundraising process
- Tracked changes in additions/deletions of LPs, LP commitments, and probability of their commitments, on a regular basis
- · Collated fundraising data in excel and created data-driven dashboard to track and monitor the weekly updates
- Expanded the horizon from weekly analysis to various time intervals' analysis to cover key milestones/dates for the fundraising such as the fund's first/second close



Developed a weekly tracker to provide insights on fundraising process

