



## CRM Implementation



***“Before TresVista, our CRM was a ~\$1mn paperweight. After, it became our competitive advantage.”***

Managing Partner, PE Firm

# Client Success

## How One Mid-Market PE Firm Reclaimed \$1.0M in Partner Time



**Mid-Market Private Equity Firm**  
\$1B AUM | 10 Investment Professionals

Engagement Duration  
**Retainer (Ongoing)**



**Before TresVista**

**~160 Hours**

Weekly Investment team's time spent on manual data entry

**~4-6 Deals**

Lost annually due to missed follow-ups

**~50 Hours**

Per quarter spent on manual LP reporting



**TresVista Engagement**



**~\$184k\***

Annual Cost for 4 Dedicated TresVista FTUs

CRM Implementation

**180 Days**



**After TresVista**

**Zero Hours**

Time spent by Onshore Deal Team

**~\$1.0M**

Investment team's time value reclaimed annually

**~\$1.1M**

Additional fee revenue from better coverage

**11.4x** total return on investment



**Payback Period: < a Quarter**

**Before TresVista, our CRM was a ~\$1mn paperweight. After, it became our competitive advantage. – Managing Partner, PE Firm**

# TresVista BDS Services

## CRM Implementation & Data Optimization



### The Cost of Manual Workflows

#### The Alternative Scenario



#### Extreme Time Drain

Manual processing of 120k records would exceed 8+ months, delaying market entry and strategic initiatives.



#### Financial Waste

Projected costs for manual staffing significantly outweigh the \$80K efficient solution.



#### Missed Opportunities

Poor data quality leads to duplicated outreach and lost deal opportunities.



### High-Volume CRM Data Deduplication & Enrichment

**120k**

Records Processed

**30k**

Duplicates Removed



**Proprietary Deduplication:** Utilized in-house tools to identify and merge 25-30% redundant data.



**Enrichment & Validation:** Validated website, office locations, deal teams, enriched data from FactSet, mapped parent/holding companies and contact details for remaining unique records.

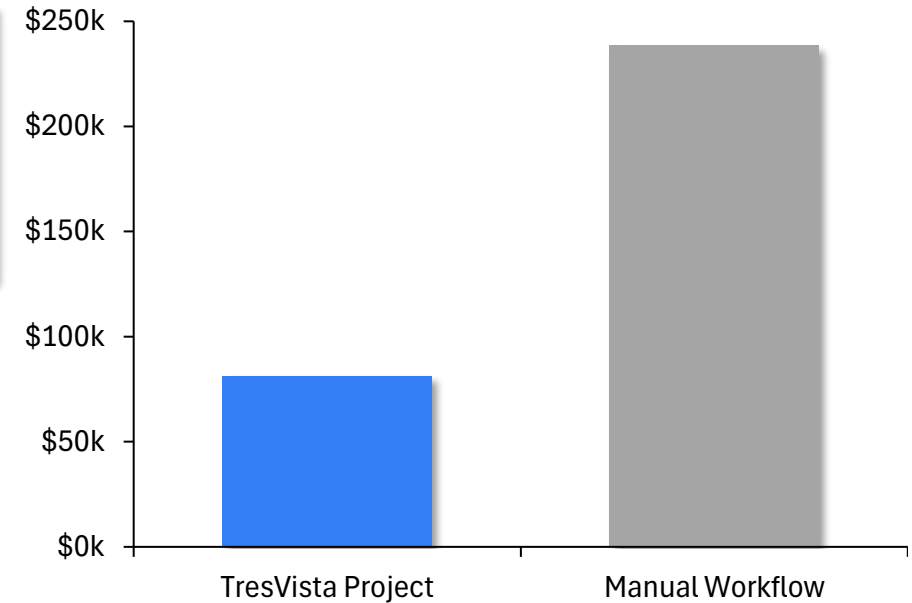
Duration  
**4 Months**

Total Cost  
**\$80,000**



### Time & Money Saved

ROI Analytics



**4+ Months**

Time Saved

**~3x Savings**

Cost Efficiency

*"The automated approach delivered a clean CRM at a fraction of the manual cost."*



Our Impact

# CRM Implementation: Data Verification & Maintenance

Private Equity | CRM Implementation | Data Enrichment | Proprietary Algorithms | Business Development Support

Clean up the existing CRM data of a **US\$25.0 billion private equity firm** having **30,000+ contacts**, **5,000+ companies**, and **300,000+ data fields**, and provide maintenance support

## TresVista's Approach

1

Normalized company information by having a standardized legal entity at the holding company level and used a third-party database to enrich the data

2

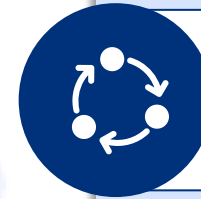
Leveraged the Proprietary algorithm of TresVista's Data Intelligence Group to flag potential duplicates, enabling the team to take a structured approach to scan the database and eliminate duplicate records

Migrated clean database onto the CRM and merged relevant information from multiple records into a unique record by collaborating with CRM provider's implementation team

3

Subsequently updated the database on an ongoing basis, further enhancing the client's marketing and business development efforts

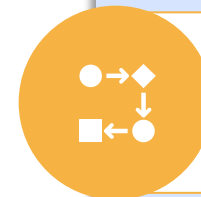
## Our Impact



Achieved a consistent organizational structure and deeper data insights through external enrichment



Ensured database integrity by scanning and removing redundant records through a structured, automated approach



Delivered a "golden record" database that continuously supports the client's marketing and business development efforts

# CRM Implementation: CRM Data Deduplication & Enrichment

CRM Data | Data Enrichment | Deduplication | Data Integrity | Financial Advisory

Cleaning and enhancing a CRM database of **~120,000 companies** for a **European financial advisory firm** to ensure seamless integration

## TresVista's Approach

1

We implemented a technology-driven workflow combining proprietary deduplication tools with manual research to ensure 100% data accuracy and readiness for CRM bulk upload

2

Identified unique companies and enriched key attributes (websites, sectors, countries, FactSet IDs) using FactSet and manual research

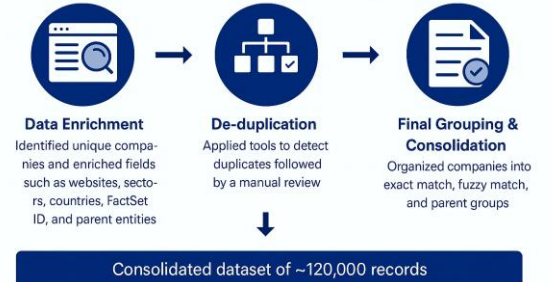
Applied in-house tools for exact and fuzzy matching, followed by a manual review for maximum accuracy

3

Organized companies into match groups (exact, fuzzy, and parent) and aligned the final output with the CRM upload template

## Our Impact

### CRM Data Preparation: Enrichment & De-duplication



Created a comprehensive master dataset of **~120,000 records** with significantly enhanced data visibility



Eliminated redundancies and ensured high database integrity across a massive dataset of **300,000+ fields**



Successfully integrated a clean, structured dataset into the client's CRM, facilitating informed strategic decision-making

# CRM Implementation: Standardizing Company & Contact Information

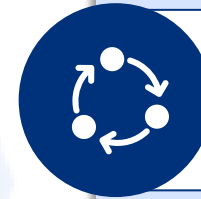
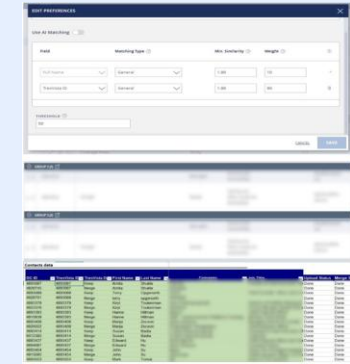
Investment Banking | CRM Standardization | Data Quality | Healthcare

Data standardization of **40,000+ contacts** and **8,000+ companies** for a healthcare-focused global investment bank with **\$100 billion in advisory assets**

## TresVista's Approach

- 1** We executed a multi-layered data cleansing and standardization process to eliminate inconsistencies in the client's CRM, ensuring all company and contact information was uniform, accurate, and enriched with industry-specific metadata
- 2** Scanned the CRM for formatting errors and standardized company records by removing suffixes (LLC, Inc.), expanding acronyms, and normalizing phone number formats  
  
Standardized 40,000+ contacts by removing salutations, correcting name casing (e.g., "john smith" to "John Smith"), and ensuring consistent designation formats (e.g., "MD" to "Managing Director")
- 3** Removed obsolete data and duplicate entries while adding specific Therapeutic and Sub-Therapeutic Areas of Interest to contacts and companies

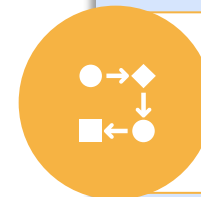
## Our Impact



Improved database uniformity across **8,000+ companies**, ensuring professional and searchable records



Enhanced the accuracy of personalized outreach and internal reporting, reducing errors in client communication



Provided a high-quality, targeted database that directly increased the efficiency of specialized healthcare sales and marketing efforts

# CRM Implementation: Deal Pipeline Management

Asset Management | Deal Pipeline Management | CRM Maintenance | Business Development Support

Maintaining and updating the DealCloud CRM with deal flows from various sales channels for a US-based **asset manager specializing in alternative investments with ~\$9.0 billion in AUM**

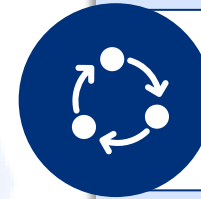
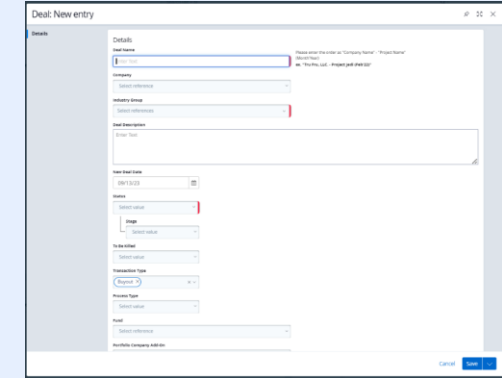
## TresVista's Approach

**1** Reviewed and logged deal-related information received via email (financial documents, sponsor/GP details, fund strategy, NAV), ensuring all data was accurately recorded in the client's DealCloud CRM

**2** Captured specific deal attributes such as vintage, industry, and selling bank while tagging deals to all relevant parties including deal teams, intermediaries, and sponsors

**3** Leveraged AI (ChatGPT) to automate the deal logging process through tailored prompts for document review and data extraction, while synchronizing communications for easy reference

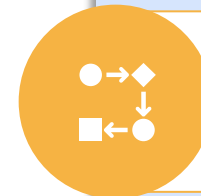
## Our Impact



Ensured all deal flows were accurately captured and categorized, providing the client with a single source of truth for their investment pipeline and fund opportunities



Created comprehensive records with deep insights and stakeholder relationships, facilitating streamlined communication and better-informed decision-making



Significantly accelerated turnaround times and improved data extraction accuracy by integrating AI-powered automation into the deal management workflow

# CRM Implementation: Logging Fund Information

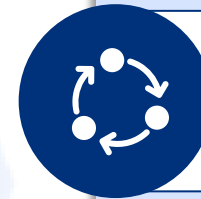
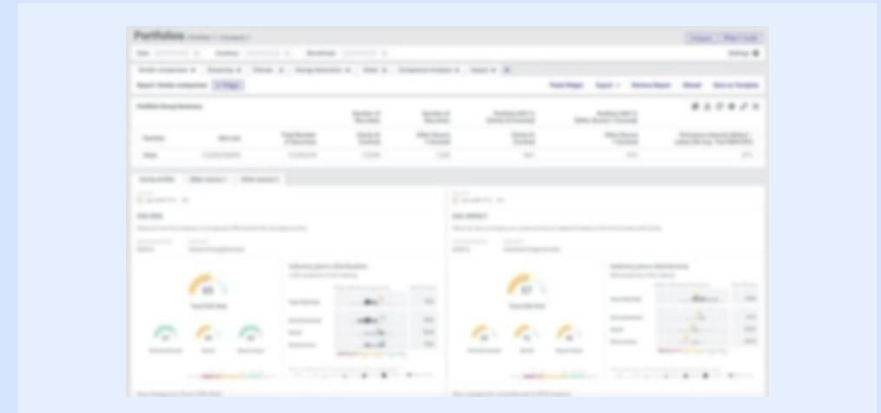
Asset Management | Fund Information Logging | CRM Maintenance | Performance Tracking | Business Development Support

Maintaining and updating the CRM with primary and secondary deal flows for a global asset manager specializing in alternative investments with over **\$1.0 trillion in AUM**

## TresVista's Approach

- 1** We received and reviewed fund-related documentation via email to extract and meticulously enter critical information - including vintage year, fund status, and GP commitment - into the client's CRM interface
- 2** Developed detailed fund-specific notes encompassing investment philosophies, focus areas, sourcing, due diligence, value creation, and exit strategies
- 3** Recorded historical performance metrics, such as IRR and MOIC multiples, and created detailed records for key personnel, including professional biographies

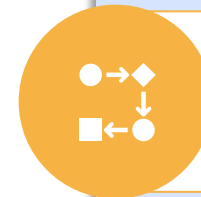
## Our Impact



Provided the client with a comprehensive and updated repository of fund data, enabling efficient investment transparency and enhanced performance reporting



Enhanced the depth of available data, offering stakeholders a clear and standardized understanding of fund-level strategies and operational processes



Facilitated better-informed investment decision-making by centralizing critical performance benchmarks and management team insights for efficient reference