



Plan For Your Future with a CRM Built for Pension Providers

Engage for Private Equity

A CRM Powered by Microsoft Dynamics 365, Leveraged by Pension Providers

Hitachi Solutions Engage for Private Equity helps pension firms improve efficiency and intelligence throughout the investment lifecycle. Every element of our solution was built to help you improve financial decisions, member & partner relationships, and expand collaboration and visibility across your various business units.

Engage for Private Equity allows firms to:

- Get the right people involved at the right time with 360-degree visibility that enables you to identify relevant business contacts, see your complete history with them, and understand the strength and value of the relationship
- Make better-informed decisions by delivering relevant, up-to-date insights into opportunities, investments, fund ownership, along with deal and fundraising pipeline
- Work the deal more efficiently by giving everyone familiar, collaborative tools, and real-time access to the documents, updates, information, and reports they need to do their job.
- Maintain discretion while working quickly in a robust security model that maintains nondisclosure between teams and individuals whose NDAs require extreme discretion around sharing deal data

Features and Capabilities



Deal Module

Engage for Private Equity can be tailored to the kinds of deals and relationships pension firms manage, including private equity, real estate, private debt, and more.

- **Deal Sourcing:** Understand where your deals are coming from and gain insight into your best sources of new opportunities
- **Deal Flow:** Manage the deal process from end-to-end so everybody stays on the same page
- **Bid Management:** Better track and manage bids and bidding groups and make sure everyone on the team can access the documents and information they need
- **Due Diligence:** Streamline due diligence and accurately track stakeholders for every deal



Advanced Relationship Module

Make sure everyone in your organization has a single view of your important business contacts and relationships, including partners, investors, institutions, legal, and professional advisory. Find and engage with the right people for every deal.

- **Contact Management:** Make better-informed decisions by delivering relevant, up-to-date insights into opportunities, investments, fund ownership, and the deal and fundraising pipelines
- **Profiling and Visualization:** Make better-informed decisions by delivering relevant, up-to-date insights into opportunities, investments, fund ownership, and pipelines
- **Partner Metrics:** Get real-time insights into partner activities, investments, portfolios, including all lines of business within your partner.



Member Service Module

Get a wholistic view of members, their investments, questions, problems, so you can improve your service response time and accuracy.

- **Member 360 Service:** Your disparate back-office systems are unified into a single lens for member service. Managing interactions and member relationships in a single solution can save time, improve communication, and member satisfaction.
- **Omnichannel Support:** Access, verify, and review member information across on channels of engagement – ensuring security and privacy.



Highest Levels of Security

The confidentiality and security of your data are paramount. Engage for Private Equity provides your pension firm with robust security features designed to safeguard sensitive member data and investment information.

- **Preserve Data Integrity:** With built-in data encryption and strong access controls, you can trust that your sensitive data is safe from unauthorized access and leaks.
- **Ensure Regulatory Compliance:** Our solution is designed to help you adhere to the strictest data security regulations.
- **Prevent Conflicts of Interest and Insider Trading:** With role-based access controls and robust security model, you can restrict access to confidential deal data, thereby preventing conflicts of interest and insider trading.

Get a better bang for your Dynamics 365 buck with Hitachi Solutions add-on solutions. We've leveraged our decades of financial services experience and technology expertise to deliver solutions that extend the value of your business applications.

[Talk to Our Experts Today](#)

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