

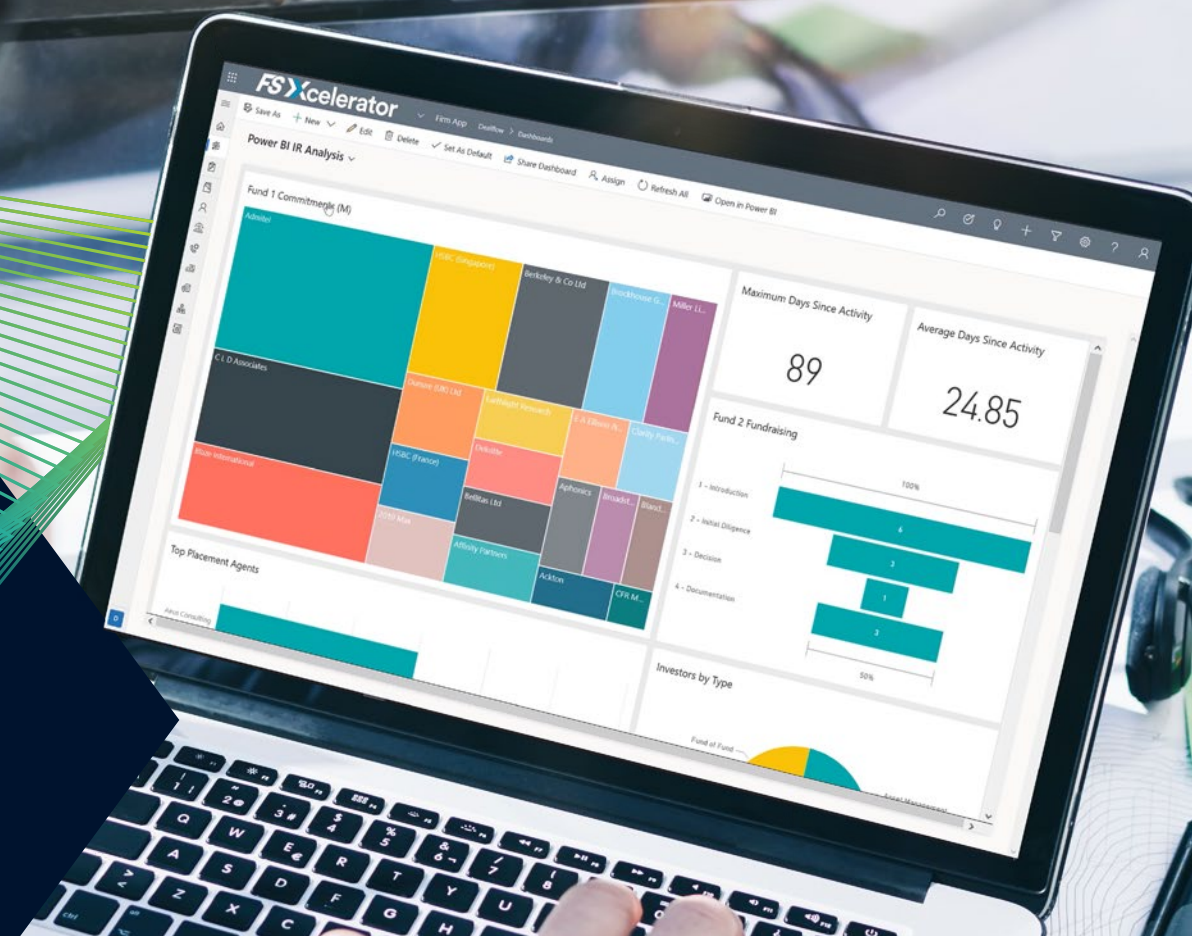
Xpedition

FS Xcelerator for Private Equity

Powered by Microsoft Dynamics 365 and Power Platform



Manage the entire private equity lifecycle, from origination to exit.



As your private equity firm grows and your clients' portfolios become more diverse or complex, you may need to implement additional compliance and governance to reduce your risk. Maybe you've been working with your existing institutional investors over a long period of time, and now you're exploring how you can develop new relationships and new funding streams.

The need for more immediate and transparent access to fund performance data has also grown as private equity clients are no longer satisfied with the traditional annual review. But most private equity firms are no longer willing to dedicate resources to manually generate reports and valuations at set milestones.

Our dedicated private equity solution will transform your investment lifecycle management requirements, automating the way your record and manage your investor data, while ensuring you remain compliant.

The FS Xcelerator for Private Equity

Powered by Microsoft Dynamics 365 and the Power Platform, FS Xcelerator for Private Equity gives you a comprehensive end-to-end solution for fundraising, investor relations and deal flow. It provides all the automated tools you need to manage everything from fundraising, to securing investment and carrying out the deal flow process.

FS Xcelerator for Private Equity ensures you capture all the relevant information you need to manage existing relationships with all stakeholders in the investment and deal. You get real-time visibility of all your investor information as they move through the investment process and stay abreast of the latest compliance.

This dedicated private equity solution gives you all the benefits and flexibility of an enterprise-wide architecture from Microsoft, while allowing you to seamlessly switch to other Microsoft capabilities required in your business.



Key Solution Highlights

- **Investor Relations:** Run end-to-end investor relationship management and support your deal activities as they progress through to committing capital into different funds. Record details of placement agents and intermediaries.
- **Fundraising:** Accurately record commitments and contracts from investors together with the amounts being deposited into funds. Gain visibility of investor vehicles and legal holding structures.
- **Deal flow:** Easily track the assigned tasks and stages of the investment process as investors look to invest in a fund. Set fee budgets, approvals and heads of terms for each deal.
- **Process Management & Automation:** Helps to guide and manage individuals, teams, and departments, whilst providing increased transparency across teams for information sharing and collaboration.
- **Management & Reporting:** Generates and visualises insights about your core business processes and team performance, giving management the ability to identify and address any risks and inefficiencies early on.
- **Security & Compliance:** Ensures client data is managed in a secure and compliant way, giving the right people access to the right data and tools at the right time.

Record third-party advisors and ESG classifications, as well as capturing consultancy fees.

FS Xcelerator Benefits

- **Supports compliance** with access to real-time reporting on the progress of investor relations, fundraising and deal flow processes.
- **Helps identify trends early** by providing process rigor and preventing workarounds from being used.
- **Enforces business process flow and governance** by identifying anything which falls outside of the norm, proactively escalating deals or creating individual approval loops.
- **Promotes organisational culture and guidance** leading to positive user experience and collaboration across different individuals in the deal team, de-risking and ensuring that deals are streamlined in the most efficient way.
- **Comprehensively manages the fundraising process** by focusing effort and enabling automated reporting on fundraising.
- **Gives investors immediate access to fund performance data** with regular reviews and outbound engagement to help ensure firms are successful with their fundraising.



“Xpedition’s system is designed for PE knowledge and competences, with an inbuilt deal flow process. The flexibility of the solution is excellent – it’s a great platform that can accommodate our special processes. It’s used by lots of areas in our business and it does what they all need. We didn’t want a sales solution, which was the only alternative: no other vendor has a Private Equity template like this.”

Thomas Weber, Managing Director,
Head of Business Development, DBAG

To learn more about Xpedition visit: xpedition.co.uk

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