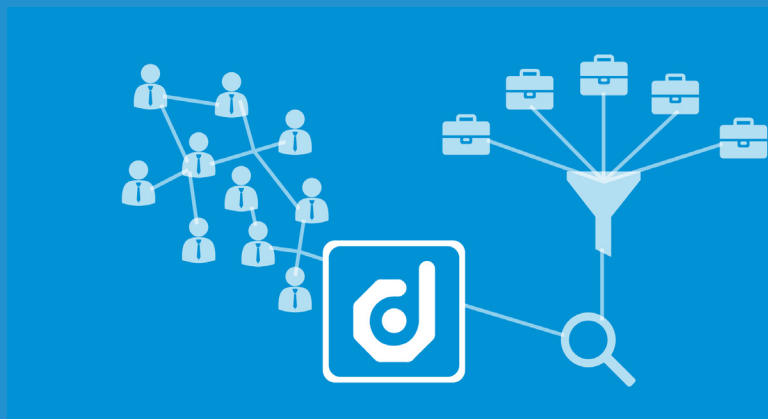


## Dynamo™ Case Study:

# Consolidating Contact Management & Simplifying Investment Due Diligence



**H**olland Private Equity (HPE), an Amsterdam-based private equity fund, had recently finished raising their latest €200m fund for executing their later stage-technology investment program. Backed by some of the most reputable limited partners in Europe and the US, Corné Jansen, HPE's Vice President, launched a comprehensive search for a highly configurable contact management and investment due diligence system.

Relying on Microsoft Office® applications since HPE's inception in 2009, the firm found that this basic software was insufficient for providing the integration needed to effectively aggregate and intelligently store prospective investment data. Additionally, when prospective investments were turned down, all the notes, documents, and analysis were stored in multi-tiered folders, resulting in a cluttered structure with a complicated retrieval system.

**"The bespoke solutions that we were looking at would be customized to maintain research and deal opportunities, but Dynamo was the only product we saw that had the functionality already established."**

Confident that a private equity-specific solution would best match HPE's business workflow and methodology, Corné took both industry-specific solutions and bespoke products under consideration. Netage's Dynamo™ was included as a private

## HPE Growth Capital.

### About HPE

Holland Private Equity (HPE) is an Amsterdam-based investment firm focusing on growth-stage investments in small to mid-market technology companies in the Benelux and Germany. HPE is supported by a base of globally renowned institutional investors, including pension funds, asset managers and family offices from Europe and the United States.

### Challenge

HPE had heavily relied on Microsoft Office® tools since inception, but the firm's deal volume became too substantial to easily manage when considering historical vetting records.

### Solution

HPE considered tailoring solutions to fit their unique workflow and needs, but ultimately decided to select the configurable Dynamo™ platform for the product's support and stability during future product releases, and ongoing compatibility with the evolving technology landscape.

equity workflow-specific platform that could be configured to meet HPE's needs, and compared against some major generic providers that offered customizability through code changes.

"In the same way that common office software solutions can cater to nearly everyone, yet consistently fall short of some of the firm-specific requirements, we anticipated a comparable experience with one of the generic solutions," noted Corné. "During the product demonstrations from varying providers, we concluded that were going to be debating between a customizable product versus a configurable platform, if only to ensure that we'd be working within an application that meets our workflow."

### "Dynamo has served as excellent choice for consolidating our deal and contact information,"

Choosing between a customized application and a configurable solution led to a series of discussions, with each option holding different merits. "Customized solutions could provide exactly what we specified provided that we could open up the checkbook for upfront costs; however, if the technical tools or environment we had were changed, the application would likely require significant maintenance, if not heavy integration overhauls," reflected Corné. "Flexible solutions like Dynamo which offer the configurability that can seamlessly evolve with new needs and challenges, have a better adaptability to new technology as the platform itself is maintained for thousands of end users."

HPE also manages a constant stream of deal opportunities. The solution for their future needed to offer intelligent methods to store all deals that pass through due diligence for future retrieval, if they need to be revisited at a later date. "Just because we pass on an investment opportunity initially, it doesn't mean that it's eliminated from our future consideration," noted Corné. "The bespoke solutions that we were looking at would be customized to maintain research and deal opportunities, but Dynamo was the only product we saw that had the functionality already established."

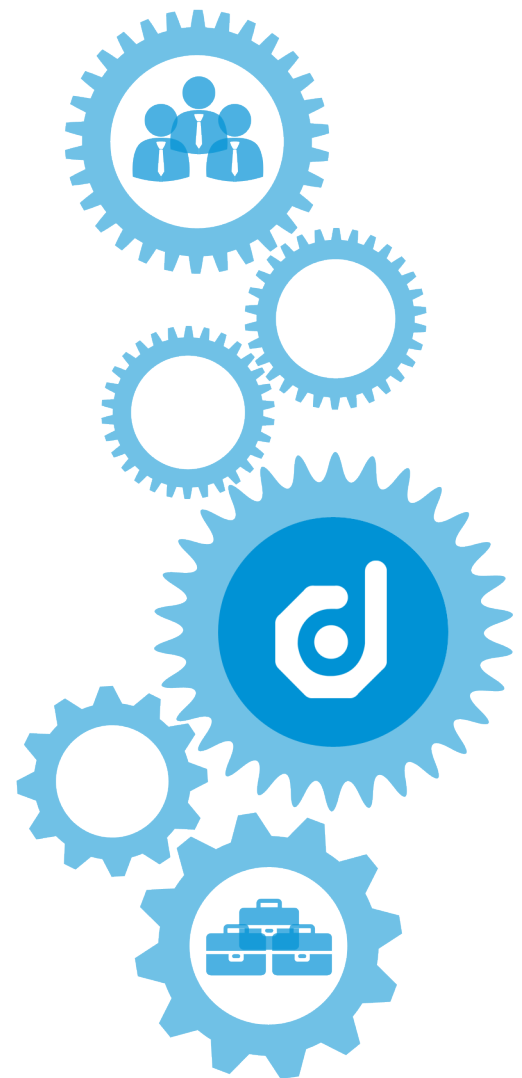
Eliminating customized products, Corné and the HPE team selected Dynamo™ to manage their contact management and deal due diligence processes. "Dynamo provided the core functionality and deal management features that could be quickly configured versus manually changed on the core application level," said Corné. "We as an organization felt very comfortable with both Dynamo as our product and Netage as our guide in outfitting the solution to address our needs."

The Dynamo™ platform's implementation was a collaborative process between Netage and HPE. "Netage was quite responsive to adjusting to my changing schedule, which was an unexpected and appreciated accommodation," commented Corné. "I was able to provide instruction on precisely what I wanted, and their European

## Results

Dynamo™ has provided HPE a streamlined funnel for managing deal opportunities and organizing due diligence efforts across the team. Users of the Dynamo™ platform since 2012, HPE has benefited from:

- Easy storage of contacts and documents
- Simple access to prior deal due diligence materials for historical comparison and year-over-year comparison
- Centralized data



client services team offered a prompt turnaround.”

Using the Dynamo™ platform since 2012, the HPE deal team has not only improved their internal processes, but found an intelligent way to provide comprehensive context for deal management. “Even though we don’t invest in a prospective company, all of that data, analysis, and reporting we’ve conducted still holds value in future consideration,” complemented Corné. “Dynamo not only stores that information in a very manageable manner, but also readily retrieves those records when the opportunity reappears.”

Greater transparency into HPE’s deal pipeline has also prompted a significant increase in communication and intra-office transparency. “Thanks to Dynamo’s automation features, we now have everyone on the same page come Monday morning and we can immediately generate the needed reports,” commented Corné. “We’ve been able to hit the ground running, even when the team is in several different locations at once.”

**“Dynamo not only stores [our deal] information in a very manageable manner, but also readily retrieves those records when the opportunity reappears.”**

Dynamo™ has also shown promise to scale to HPEs expanding requirements. “Dynamo has served as excellent choice for consolidating our deal and contact information,” finished Corné. “After using a solution that has exposed other areas that could use improvement, we’re now exploring new ways that it can help manage our investment management research.”

### About Netage

Netage Solutions, Inc. provides industry-specific CRM software designed for alternative investment professionals, including hedge funds, private equity and venture capital funds, real estate funds, prime brokers, funds of funds, and institutional investors. Intuitive and highly configurable, the Dynamo™ platform has improved the productivity of deal management and fundraising teams worldwide. Collectively, our 300+ clients manage more than \$750 billion in assets.

