A GUIDE FOR INVESTMENT BANKERS

Understand, Automate, and Optimize Your Deal Pipeline

Win more mandates more quickly with the New Affinity Analytics

Are you confident you have a clear understanding of your prospecting and engagement efforts?

Affinity Analytics is the Affinity CRM's interactive reporting tool. It is available to all Affinity Premium customers.

Win more mandates faster

By providing easy-to-understand visualizations of complex data, Affinity Analytics enables investment bankers to:

- Easily surface real-time insights by drilling into ongoing trends
- Uncork bottlenecks to improve your business workflows
- Forecast pipeline activity and revenue
- Gauge deal flow over time
- Nurture your most valued relationships

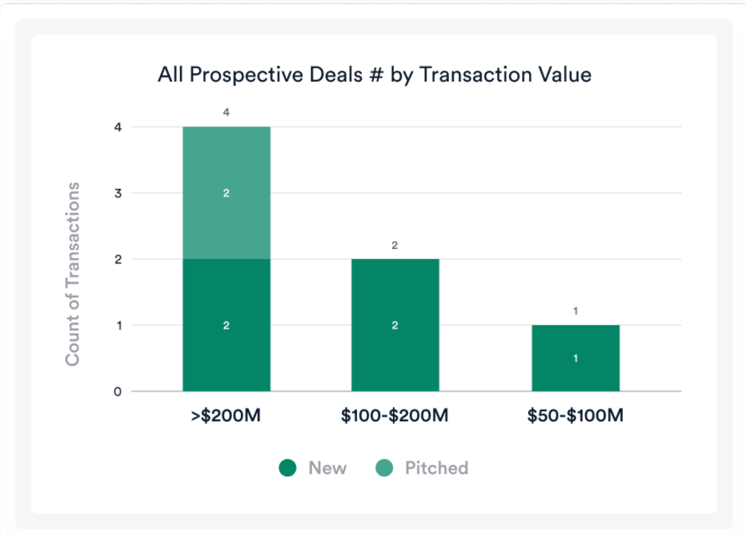
This guide highlights some of the many ways investment bankers are currently using Affinity Analytics to make their prospecting and deal management more efficient and secure more business.

Assess the status and value of every opportunity

The Affinity relationship intelligence CRM quantifies the number of quality mandates in your pipeline or prospect list based on criteria you establish, such as the value and stage of engagement.

You can use this data to set business development benchmarks and forecasts based on expected revenue from engaged and live deals, and analyze the number of transitions in your pipeline by fee size. In this example, the expected revenue can be closely correlated to the size of the deals currently in the dealflow.

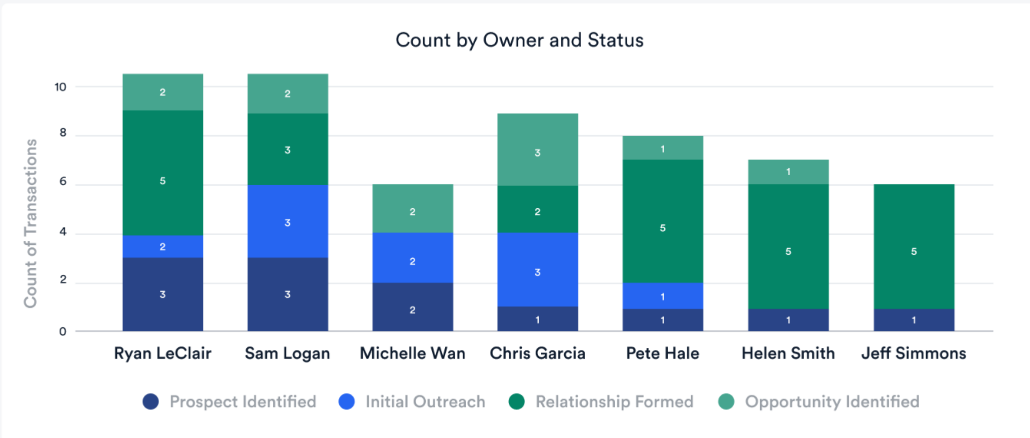
Establish and track meaningful KPIs informed by real-time data about your mandates and the value of every opportunity you pursue.

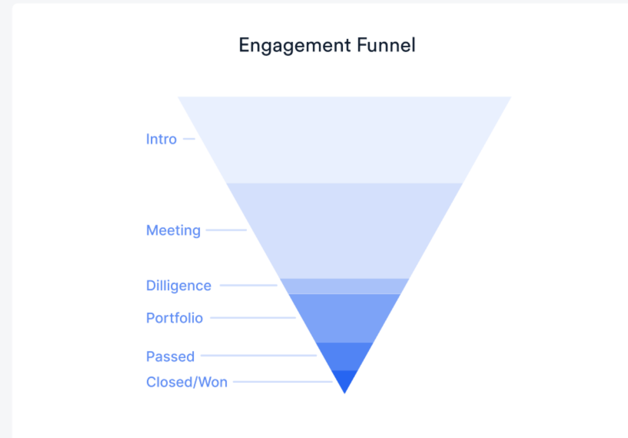


Forecast business and surface trends over time

How is your business performing? The data visualized as bar charts shows your entire team which new mandates you're currently pursuing but have not yet won, which you've won already won (top), and which you're working to close (bottom)—revealing where you should increase prospecting and engagement efforts.

> **Understand the nuances of your team's activities with analytics about their prospecting, engagements, and deal management—by transaction type, sector, status, and value.**





Track who is working on what and how well the mandates are moving along.

Get a complete history of your interactions with a person, organization, or opportunity.

Clearly visualize team operations

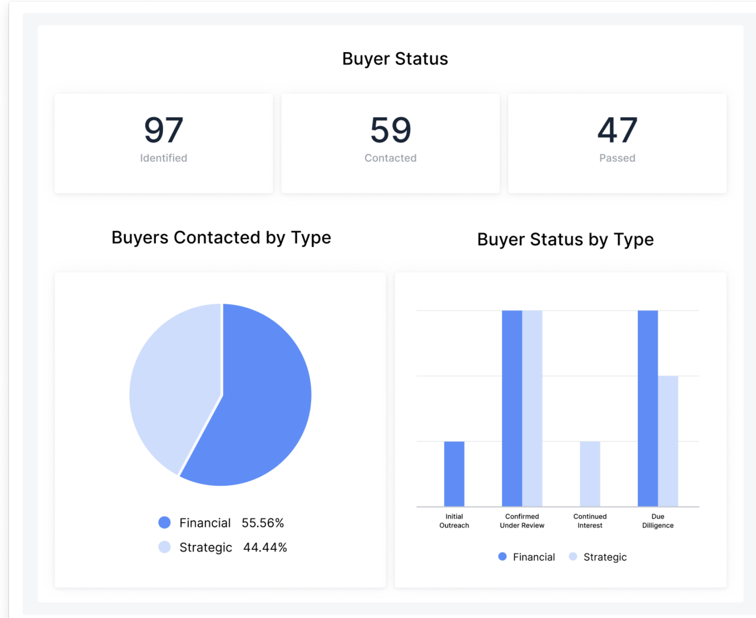
The correlation between pursued opportunities and deal closure over time tells you how team activity volume and bandwidth changes weekly, monthly, or annually as your business accelerates or the market shifts. Here, you can construct a holistic view of who's working on what and how well the mandates are moving along.

Measure each mandate by team member, status, and transaction value, and aggregate engagement metrics and average effort levels related to new business development.

Easily generate easy-to-understand client status reports

Deliver organized, in-depth updates to your clients with just a few clicks. Gauge the progress your team is making on every mandate, and show clients what work you've done to move their deal forward. Automatically generated, easy-to-understand dashboards help your clients understand the data.

> **Stay focused on important mandate metrics and never lose touch with your team's progress.**



Detailed Update

	Company	Buyer Type	Teaser Sent	NDA Sent	NDA Signed
1	Sierra Ventures	Financial	✓	✓	✓
2	Primary Inc	Strategic	✓	✓	✓
3	Forward Systems	Strategic	✓	✓	✓
4	Appera One	Financial	✓	✓	✓
5	Bloom Labs	Strategic	✓	✓	
6	Columbus Ventures	Financial	✓	✓	✓
7	Waya Bank	Strategic	✓	✓	✓
8	Zhou + Goel	Strategic	✓	✓	✓
9	Carrot	Financial	✓	✓	✓
10	Moon Homes	Financial	✓	✓	✓
11	Hera Health	Financial	✓		

	New	Pitched	Engaged	Live	Completed	Total
# Transactions	2	5	7	3	2	19
Pending Fees($M)	1,950,000	2,750,000	3,725,000	875,000	20,000	9,320,000
Colleced Fees ($M)	200,000	200,000	410,000	50,000	50,000	930,000

Track financial performance

Getting an precise, organized view into revenue sources keeps your fingers on the pulse on what's working and what's not—where new opportunities lie and where opportunities for improvement exist. This easy-to-read dashboard provides high-level information about pipeline performance for the weekly calls with your team.

Monitor the most impactful revenue sources through easy-to-understand visualizations about your deal management and team's performance.

These are just some of the many ways investment bankers are already using the Affinity CRM and Affinity Analytics to make more efficient use of their team's resources, keep track of their business network, and source and pursue more valuable deals more quickly. Affinity can help your firm do the same.

Contact a customer success manager at info@affinity.co to:

- Learn how to customize Affinity Analytics to best support your analytics requirements.
- Upgrade to Affinity Premium to get access to Affinity Analytics—now with Team Activity data that further enhances the scope of its reporting.
- Upgrade to enhanced customer support to access additional customization assistance.

Affinity: The relationship intelligence platform for dealmakers.