



A GUIDE TO

Affinity Analytics for Venture Capital Firms

Analyze, understand, and optimize your deal pipeline—and close more deals more quickly.

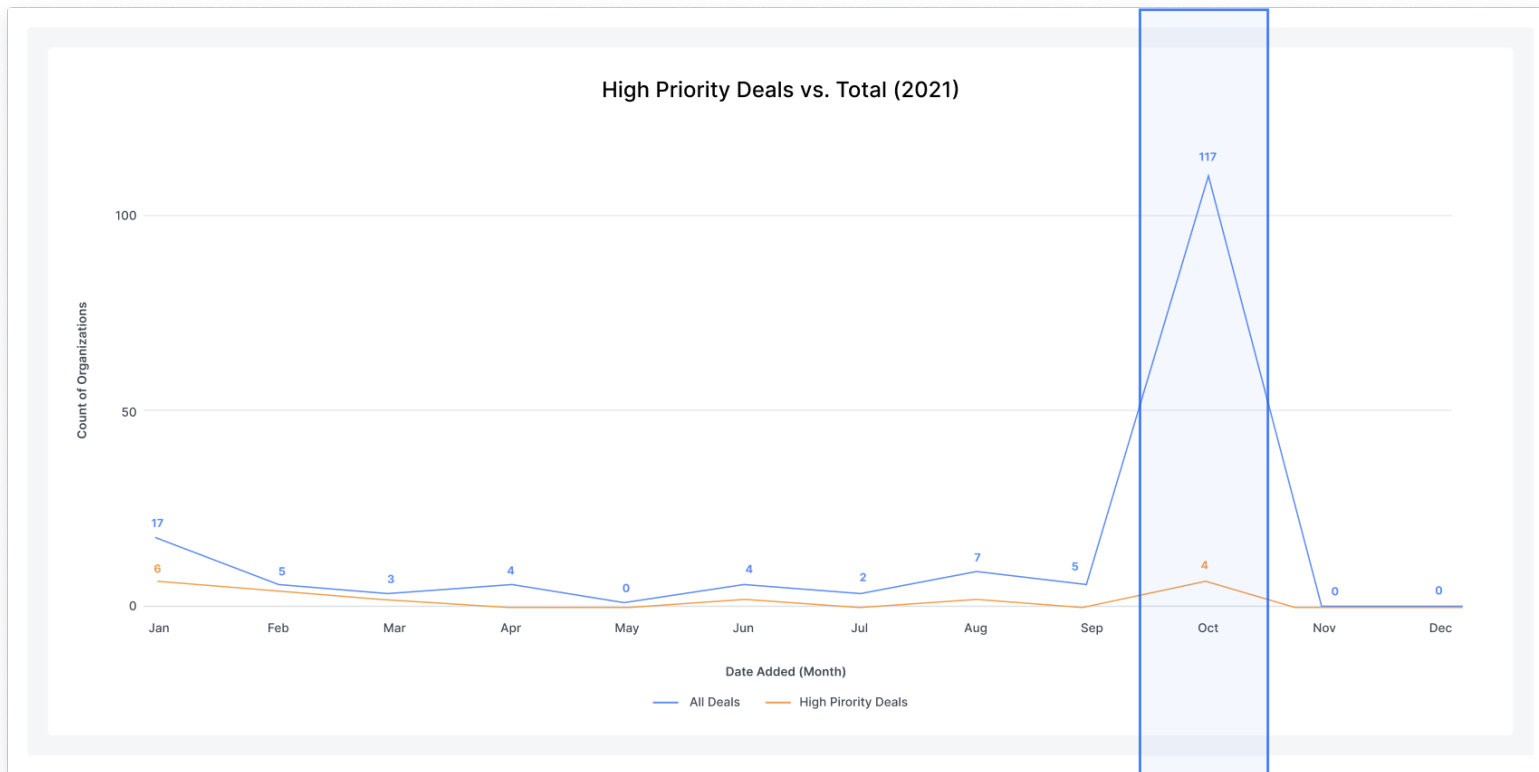
Is your deal-making process as efficient as it could be?

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

By providing easy-to-understand visualizations of complex data, Affinity Analytics enables investment professionals to easily surface real-time insights, drill into ongoing trends, and optimize deal-making activities. Interactive reports on your team's pipeline performance enable you to closely monitor your deal flow while ensuring you continue to nurture your most valued relationships.

This guide highlights some of the many ways **venture capital firms** are using Affinity Analytics to make their deal-making more efficient—and more successful.





Assess the quality of your deal opportunities

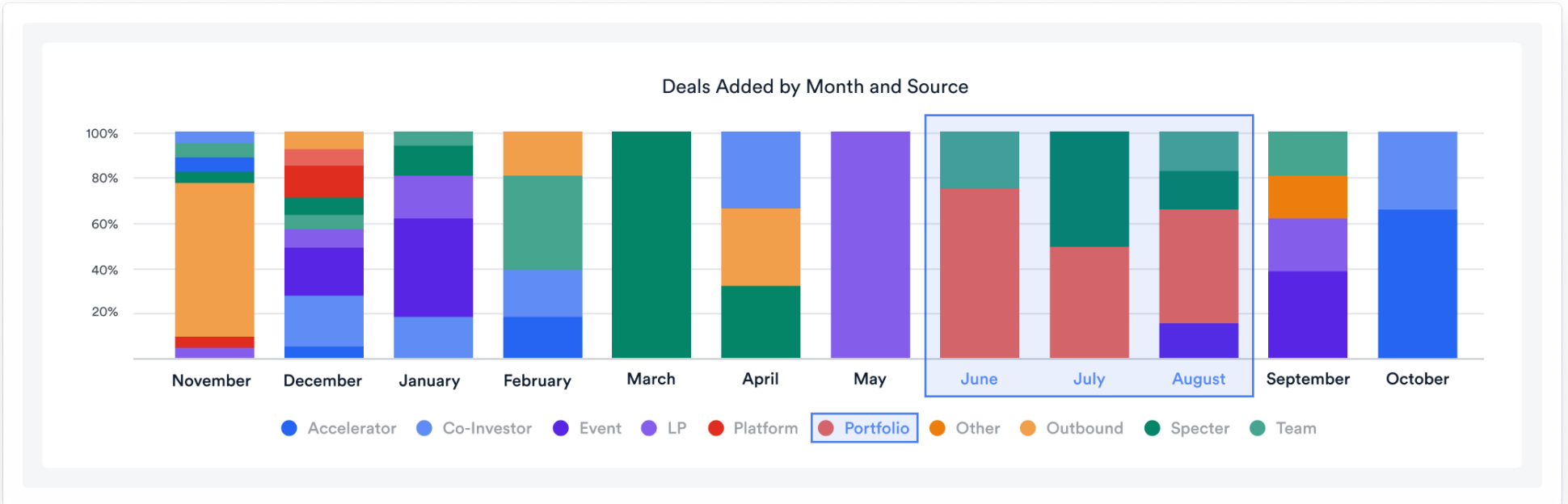
The Affinity relationship intelligence CRM enables you to quantify the number of quality opportunities your team pursues based on criteria you establish—such as the stage they reach in your deal flow—and then map them across a time period you specify.

You can use this data to establish benchmarks based on efficiency scores and historical trends that represent the

percentage of total opportunities that have become quality deals. In this example, the number of total and quality deals appear to track closely, and the most recent month for which there is data—October 2021—shows an increase in all deals but a consistent quantity of high-priority deals.

Establish meaningful KPIs informed by real-time data about your sources, prospects, and deals.





Determine your most valuable sources

Where are your best deals coming from? One way to measure ROI is by tracking your deal sourcing categories. The data visualized as a bar chart above shows that in June, July, and August, leads from Portfolio companies took over the pipeline.

Understand the nuances of your team's activities with analytics about their prospecting, deal-making activities, and relationship management—by source, sector, and other variables.





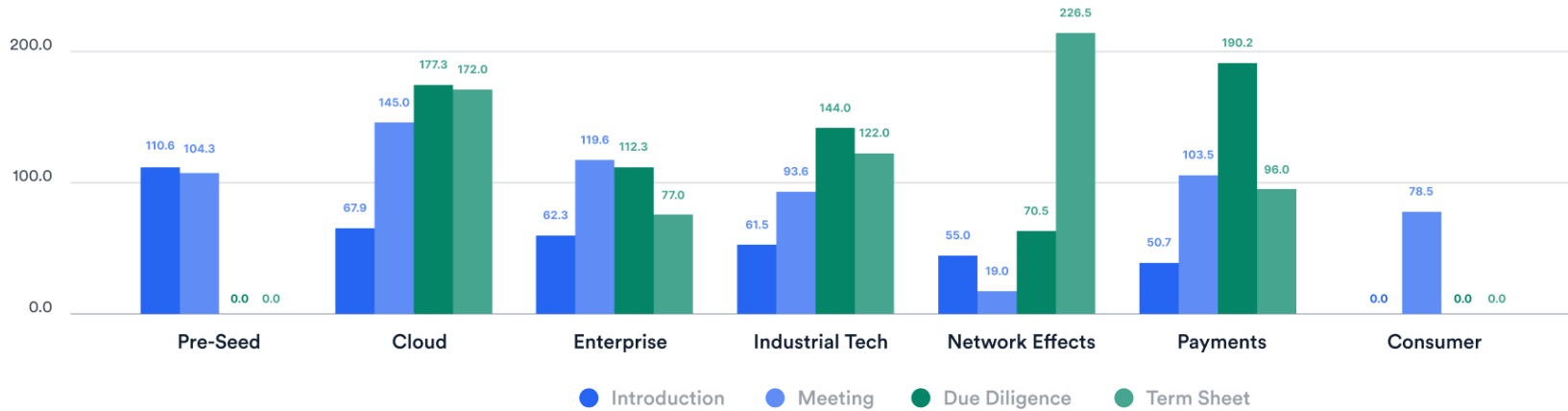
Improve ROI

Once you've identified your most fruitful deal sources, you can compare source against deal quality to determine which channels to invest in further and which to deprioritize. Here, more short-list prospects resulted from cold emails than from LinkedIn, despite more leads originating from LinkedIn.

Measure the efficiency of your team's deal sourcing by surfacing trends in your deal-making workflow that would otherwise go unnoticed.



Average Days in Each Status by Vertical



Accelerate speed to close

How long does it take to move a deal from awareness to first meeting? Partner meeting to terms? While your team’s deal-making surely impacts the health of your pipeline, it also impacts a founder’s experience of your firm: a drawn-out process might diminish the founder’s appetite to do business with you. In this example, decisions about the Network Effects sector are waiting

longer for a final decision, while Pre-Seed investments are slower to move forward from the start. The Industrial Tech industry pipeline is moving more smoothly than the others.

Monitor your deal flow through familiar, easy-to-understand visualizations about your pipeline performance and your team’s activities.



Companies in Introduction Stage for 10+ Days

	Name	Deal Lead	Days
1	Sierra Ventures	Ryan LeClair	291
2	Sierra Ventures	Marcy Park	291
3	Forward Systems	Sam Logan	278
4	Bloom Labs	Sam Logan	277
5	Columbus Ventures	Cam Woodward	138
6	Zhou + Goel	Michelle Wan	124
7	Hera Health	Matthew Ortega	83
8	Moon Homes	Ricardo Garcia	69
9	Code Corp	Helen Williams	55

(To Discuss) > 7 Days

List of Owner

Ryan LeClair
Samantha Logan
Matthew Ortega
Michelle Wan
Cam Woodward, Michelle Wan
Fatima Rahimian
Helen Williams
Ryan LeClair, Cam Woodward
Matthew Ortega

6	A3 Capital
7	Hera Health
8	Moon Homes
9	Waya Bank

Keep your team up to date

Affinity Analytics helps you identify deficits in your pipeline that are slowing down your deal-making. You can set up automated reports for your team based on deal status—how long a deal has been languishing, for example—encouraging them to follow up with the prospect in order to set up another meeting.

In this example, a report has been created for deals in the Introduction stage for 10 or more days, reminding team members to reach out to their contacts.

Stay in touch with your highest-impact connections and keep track of your most valuable deals.



These are just some of the many ways venture capitalists and other investment professionals use 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. 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 service to access additional customization assistance.

Affinity: The relationship intelligence platform for dealmakers.

