

# Cloud & Clear:

Centralizing contact management, fundraising, and investing processes.



AIM by Application Experts transforms Salesforce.com into a *complete front office solution for Fund Managers*.

Using AIM means *better communication* with limited partners and attracting and retaining more in the future. It means a *deeper understanding* of all investments in your universe, your pipeline, and your portfolio. It means more time investing and fundraising and less time hunting for information and preparing for meetings.

CRM systems are designed to track and forecast sales activities. AIM is different. AIM speaks the language of private equity and understands the complex relationships between people and organizations in both the fundraising and investing workflows.

## Leverage the Salesforce.com cloud

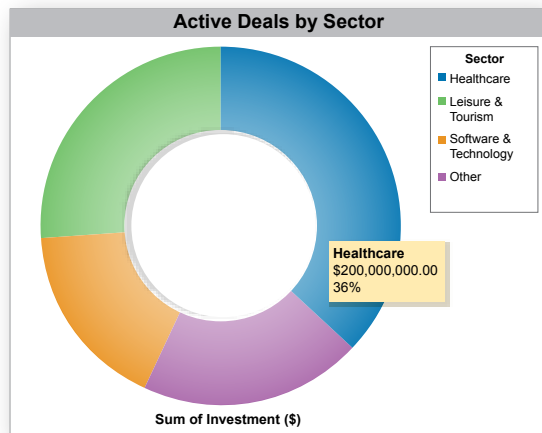
Application Experts created AIM based on years of experience working with alternative asset fund managers and investors. With AIM there's no hardware to buy or software to install. Your entire team can access the system from anywhere, including a mobile phone, and share up-to-the-minute information.

AIM runs entirely inside the Salesforce.com cloud for rock-solid reliability and security. The platform is a market leader with over 2 million users and \$1 billion in annual revenue.

## Optimize your investment pipeline

AIM enables you to track deals through the entire evaluation process in a scalable manner. Increased deal-flow is easily handled without adding complexity and confusion.

The system provides structure and helps your team perform necessary due diligence steps accurately and on time. All important changes in deal data are tracked for easy compliance reporting.



When the time comes to make an investment decision, every piece of information you have about a deal: every meeting held, every party involved, and every critical email is in one place, facilitating more informed decisions and a more efficient process.

## Maximize fundraising opportunities

AIM offers complete visibility into your fundraising pipeline and a full history of communication. The system is both flexible and robust to support a wide range of fundraising strategies.

AIM generates numbered PPM documents and can deliver them via fully integrated secure data rooms. An audit trail of who, what, and when is automatically maintained for all data room activities.

Many AIM clients demonstrate their systems to potential limited partners as part of their pitch. Having a company knowledgebase that demonstrates an investing methodology and a clear record of due diligence activity makes a powerful statement to potential investors.

## Complete the relationship cycle

AIM empowers your front office with tools necessary to stay in contact with limited partners and monitor all fund investments. Investor relations staff has ready access to subscription information and up-to-date metrics on portfolio companies and fund performance. This visibility creates higher levels of service and reinforces credibility for future fundraising.

*AIM streamlines Monday morning meetings and raises accountability for everyone. The productivity gains have been meaningful and are driven by App-X's unique industry expertise.*

**Michael Painter** Plexus Capital

## Stay focused on investing, not software

Your time is valuable. You can't afford to spend months implementing new software, nor will your team appreciate a system that adds work to their day.

We understand the world of private equity and have developed a thorough and efficient process for implementation and training so it's completed in weeks, not months. AIM is configured to your unique needs, so it lightens your workload instead of adding to it, and once you're up and running we provide ongoing support so your team can focus on investing and fundraising.

For a demonstration visit [www.app-x.com/aim](http://www.app-x.com/aim)  
Or contact Jeff Vahrenwald at (303) 565-5922 or [jeff.vahrenwald@app-x.com](mailto:jeff.vahrenwald@app-x.com)



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