prodware
mergers & acquisitions

Manage your M&A process from pitch to closed deal with Prodware Mergers & Acquisitions solution for Microsoft Dynamics 365

If you are responsible for the M&A activity in your organisation, you will recognise these concerns:

"New ideas discussed in the sector calls are not stored and appear again and again."

"We have situations where several teams visit the same client without knowing about the other one."

"We need a solution so intuitive that no training is needed."

Why choose Prodware Mergers & Acquisitions?

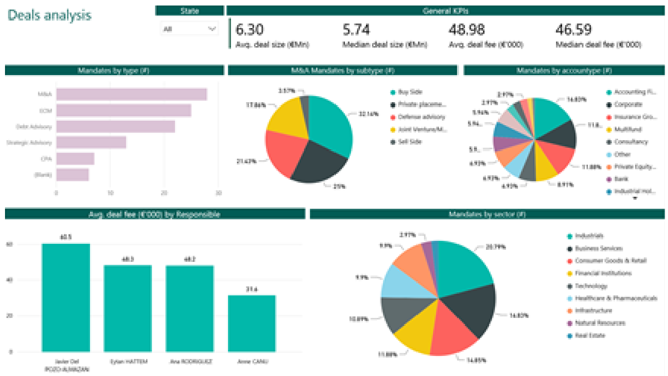
A centralised and specific application that enhances your future-proof Microsoft Dynamics 365 solution will help. How? Your business can grow without administrative barriers, your teams can store and share information, your client and prospect data can be secure, and your colleagues to be up and running quickly whilst collaborating and becoming more productive.

To run a successful M&A operation you need complete visibility into:

- Account life cycle
- Target lists segmented by sector
- Ideas generated
- Meeting notes
- Pitches in progress
- Race sheets for buy-side/sell-side
- Deals in the pipe
- Related documentation

Powerful management monitoring and business intelligence

Through the intuitive Microsoft enabled reporting and monitoring tools such as dashboards, reports, charts, views, dynamic Excel and Power BI analytics, managers can achieve a real-time view of business KPIs. Prodware have created specific M&A built-in reports that surface trends of the pipe, conversion ratios of pitches, repartition of the account install base, various financial statistics coming from deals in progress and signed deals.



Ideas & pitches management

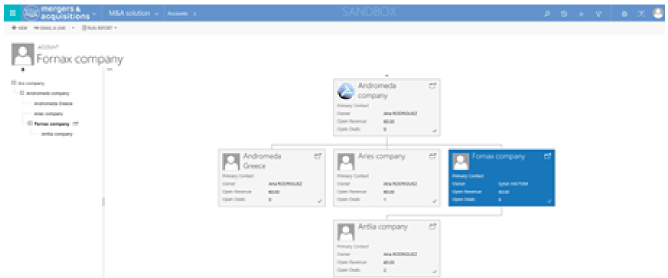
The Prodware Mergers & Acquisitions solution for Dynamics 365 provides a platform to manage ideas and convert them to pitches. Ideas are entered by any user and pass through a qualification process bar. Mature Ideas are promoted to Pitches from where you can prepare the pitch - researching the target company, scheduling appointments, whilst storing and sharing information internally.

Deal Management

Successful pitches are converted into Deals triggering a guided process through the lifecycle of the deal; including the assignment preparation, customer contact, due diligence and finally the closure action. Productivity and best practice is encouraged via automatic alerts and notifications at milestones, such as the Conflict File on deal creation, signature of the mandate and the announcement of the deal to the market. Whether the deal is a sell-side or buy-side the system allows management of a list of counterparts that are eligible to buy/ sell the target company. Bankers have a clear view of the state of advancement with each one of the counterparts including the ability to adapt the selection process according to the specific deal characteristics.

Customer Relationship Management

Because you have Accounts and Contacts within your database you can manage your organisation's level and type of contact strategy with them from ideas to pitches to deal management. The account 360 view helps users see associated pitches, meeting notes, affiliated companies etc to benefit from a full comprehensive view. Because the system has native integration with Outlook and mobile; users can sync emails, tasks and appointments; accessing and carrying out their work wherever they need it.



Secure

Built on a strong and customisable security model that gives your employees access only to the accounts, tasks, pitches and deals that they are entitled to.

Flexible

Configure new fields
Change the layout of forms and views
Modify picklist values
Add business logic
Create pre-defined queries
Build new reports

Future-proof

Certified for Microsoft AppSource, the solution is available for free trial or online purchasing.

Give your organisation the right tools to manage ideas, qualify them to pitches and convert them to deals using a single automated business process.