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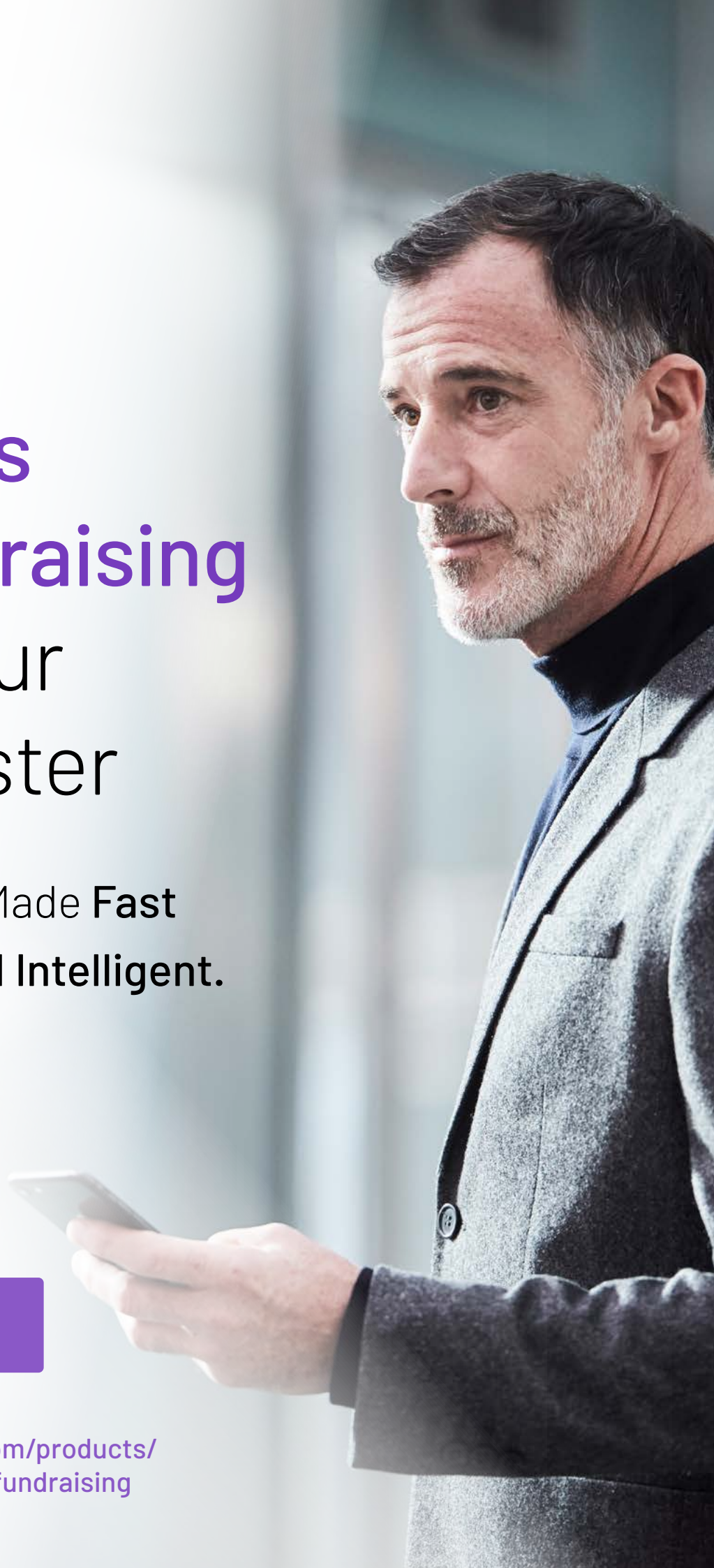
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EUROPEAN AWARDS 2021



Supporting growth in challenging times

By A. Paris

Private capital may have historically lagged the rest of the asset management industry in terms of technology and digitisation, but the past year has brought about a sea change in this regard. As teams were shifted to remote working, general partners (GPs) had to use new tools and solutions to encourage collaboration and productivity while also guaranteeing open communication with limited partners (LPs), whose need for data and information increased sharply.

In this environment, which was new territory for some PE managers, the support they received from their service providers proved invaluable. The winners of this year's awards assisted their clients through the transition and the uncertainty the year had to offer, providing solutions and services to streamline operational processes and refine investment insights.

"While the past 12 months have been very tricky and uncertain for many, due to Covid and the end of the UK's transitional arrangements with the EU, we've seen many of our PE clients not just surviving, but actually thriving, together with a number of start-ups and spinouts," notes Matthew Crisp, CEO, at Wheelhouse Advisors, crowned the Best Accounting Firm, "So, despite the tumultuous year, we have found that our business has been increasingly busy."

However, although PE firms found ways of excelling in this trying environment, hurdles remain.

"One of the key challenges is the huge increase in regulation which has really emphasised the client need for support in reacting to, and complying with, the increasing amount of global regulation across our industry," comments Alex Di Santo, Group Head of Private Equity Fund Services, Crestbridge. "Whether it's FATCA, CRS, AIFMD or DAC6, our clients rely on our expertise as an outsourced provider to make regulatory compliance easy." The firm won the awards for Best Fund Administrator – Technology this year.

Service providers have also been taking stock internally, George Ralph, Global Managing Director at RFA, this year's Best Cloud Services Provider, outlines: "RFA are using the opportunity of the massive shift in working conditions to develop a better understanding of ESG and how we deploy an even more successful policy within our own business. Business travel is a great example of this. Before 2020, I for one seemed to always be in flight somewhere. RFA have nine global locations across three continents and as Global MD, I have a responsibility to each and every one of our 300 plus employees worldwide. Covid has taught me new ways to communicate and collaborate to still get the job done, just remotely."

By and large though, particularly with the support of strong partners, the PE industry is expected to thrive. Ron Biscardi, CEO and Co-Founder of iConnections, winner of the Best Fund Raising Solution award shares his perspective: "We are bullish on PE and the entire alternatives space. The alternative asset management industry is now experiencing digital alpha – the power of algorithms, computing and technological prowess to significantly improve work product – which will have an end result of providing greater value to the LP community." ■

Responsiveness and agility key to success

SS&C Intralinks: Best Investor Relations Technology

Requests for more data and transparency are changing the private equity landscape. These demands have become burdensome from the general partners' (GPs) perspective so the need for efficiency on this front has been pushed to the fore.



"Although these demands have been on the rise for the past few years, they increased pretty rapidly over the last year," comments Bob Petrocchi, senior vice president and co-general manager of SS&C Intralinks. "I think, because we were operating remotely, these requests were compressed in terms of timeframe. We also observed heightened levels of expected responsiveness. In this context, our ability to be agile and address these needs promptly served us well."

The firm invested heavily into its portal to facilitate the provision of the level of transparency limited partners (LPs) are demanding of their managers.

Petrocchi outlines: "One of the challenges we faced, and overcame, was integrating our services into GP's systems and transforming them into more of a portal environment where LPs can download data. This helps alleviate transparency concerns by investors and streamline the process. Having the ability to interact [in] real time with a portal has been very helpful in dealing with some of the transparency challenges in the relationship between LPs and GPs."

SS&C Intralinks will continue to develop new tools and solutions, while maintaining investment in its existing offerings to make sure it can provide value-add across the entire ecosystem. Petrocchi details: "We're currently giving companies the ability to interact with our systems. The next step will be to provide actionable insights in a format that is easy to consume.

"One example of this innovation is the integrated investor onboarding tool. This automates the whole registration and documentation process and will be directly accessed through the SS&C platform. It's a natural extension of our fund-raising offering."

Fund managers' main objective is to create value for LPs, attracting and engaging investors. In view of this, Petrocchi highlights: "We believe SS&C Intralinks is uniquely positioned to understand the priorities and challenges faced by fund managers. Given that we sit at the centre of the alternative investment ecosystem, we feel we're the only alternatives provider to offer a full end-to-end platform that's going to meet the needs across the fund managers' entire organisation.

"Our healthy GP and LP community is what has made our firm successful and built a level of brand recognition. They have helped us keep a close eye on what is happening in the PE space and adapt our services and solutions accordingly."

This community is the largest in the industry and Petrocchi believes it really sets the firm apart: "We have over 240,000 LPs logging onto our platform every day and over 1,500 fund manager clients using our solutions to communicate to LPs."

Given the growing role of technology in the PE space, a firm like SS&C Intralinks is well placed to provide support. "Typically, adoption has been slower, but players have now been forced to become more familiar with technology and how to use it.

"Technology makes the whole PE process move quicker and it can also reduce the time to close. We're proud to say our Intralinks platform facilitated more than one out of every two dollars raised globally in private capital last year," Petrocchi underscores. ■

Bob Petrocchi
Co-President, SS&C Intralinks

Bob Petrocchi is the Co-President of SS&C Intralinks. In this role, Bob is responsible for the end-to-end management of the organisation along with Ken Bisconti. He formerly served as Chief Revenue Officer and the Head of Sales for Intralinks. Prior to joining SS&C, Bob was the Managing Director of Financial Services at Microsoft where he drove transformation to the cloud for Microsoft's largest financial services customers representing ~USD500 million in annual revenue. In addition to his work at Intralinks, he is a member of the Board of Trustees at Eden Autism Services and an active member and coach in the Special Olympics community.

More complex client needs as trends accelerate

FIS: Best Portfolio Management Software Provider

As private equity continues to attract more and more capital from existing and new sources like high-net worth individuals, managers must meet the changing investor needs. There has been a rise in asset class cross-over with traditional managers buying private firms or starting closed-end vehicles and private capital firms launching open-ended structures.

"This trend has been accelerated by Covid-19, due to its impact on the debt and lending markets," comments Shannon Dolan, SVP – Head of Asset Management and Private Markets, FIS. "These developments will lead to operational convergence and a greater need for standards and regulations on the private side. Thus, we see increasing rates of technology adoption to enable the automation, scalability, and data access."

Client needs are becoming more complex as the market responds to the changing investor landscape and more capital flows into the asset class. With these factors at play, Dolan expects to see growing convergence across the liquidity spectrum which in turn heightens the need for secure, accessible, data throughout the ecosystem.

The topic of connectivity and integration within the private equity industry has never been more relevant. Dolan outlines: "Private equity is known to attract the best and brightest across all functions, and that translates into setting up a best of breed technology framework to support that talent across firm. This best of breed approach creates an integration challenge, to make all of these systems speak seamlessly with each other. FIS understands this challenge and our API strategy to drive openness of our core systems is helping to solve this problem."

Dolan highlights how the multiple constituents FIS serves, including fund administrators, GPs, and LPs, share some key challenges which revolve around the data needed to effectively source and place capital and create value in their portfolio: "In all cases, clean, accurate, easily accessible data is key throughout their value chain from investors through to the portfolio companies.

"Our Private Capital Suite with the GL and allocations engine at its core is fundamental to creating and managing accurate data on complex fund structures, detailed partnership capital statements and look-through schedule of investments."

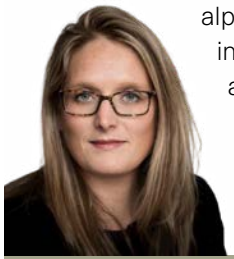


FIS is also due to release its Digital Integration Hub which will allow clients to connect the FIS suite to other solutions they may use throughout their operation for frictionless data integration.

As the pace of change across the PE industry is expected to accelerate, Dolan underscores three primary evolutions, namely ESG, crypto-currencies and globalisation: "ESG will no longer be a space to watch but will become a performance standard. We're seeing it already with corporate responsibility officers being appointed at the C-suite level.

"Digital assets will either evolve to become a major asset class or fizzle out over the next year or so. In the meantime, managers are going to test the waters and some will go all in. Finally, I anticipate further globalisation of PE. Preqin' s research suggests PE will grow substantially faster in Asia relative to developed markets.

"There is an enormous venture community in China, and with the developing African sub-continent, and the maturation of the Middle East markets there is alpha available. As more capital pours into the asset class in search of that alpha, the digital economy, drone coverage, and video conferencing standards, make the world very small and much more accessible." ■



Shannon Dolan
SVP, Head of Asset Management & Private Markets

Shannon Dolan is SVP, Business Unit Executive – Asset Management and Private Markets at FIS in New York.

Virtual platforms come to the fore

iConnections: Best Fund Raising Solution



As travel restrictions extended beyond March 2020, raising assets without face-to-face meetings proved challenging, especially in private markets which are heavily reliant on personal relationships. In this environment, asset owners and investment managers recognised the need to think laterally and search for a virtual platform which understands the bespoke needs of the private capital community.

"Prior to the pandemic, the capital introduction process was largely centred around conferences, which by their very nature tended to be quite regional in their reach," observes Ron Biscardi, CEO and Co-Founder of iConnections. "They also tended to have a narrower scope, focusing on a particular asset class or a particular client group. This, in turn, created siloes which were not necessarily an issue when travel was a possibility."

However, the pandemic upended this whole process. "Geographic barriers can be broken down; you can bring the best people in the 'virtual' room from all over the world, showcase your expertise, track record, present ideas, expand the investable horizons for allocators and create greater fundraising opportunities for managers," highlights Biscardi, adding these are all important learnings for when physical interactions resume.

iConnections identified the need managers and allocators had in this new virtual environment and sought to provide a platform that could match asset allocators and asset owners. It facilitates meetings which would be most relevant to both parties, depending on their profiles, and provides a professional and confidential environment in which to conduct the initial pre-screening meetings as well as future follow-ups.

The private capital industry and alternative investment management as a whole values peer-to-peer connections and these have been inevitably impacted by the pandemic. In recognition of this, iConnections offers 'coffee chats' for informal idea exchange and sharing best practices to help build and maintain those relationships. Biscardi notes: "This can be especially valuable for the small and midsize PE firms that often don't have as much access as larger firms. The industry as a whole has a huge amount of dry powder which needs to be deployed. To ensure the most efficient allocation of capital, thus making the fundraising process more efficient, is critical. Doing this well leaves more time for investing and therefore generating even better returns for end investors, endowments, pension plans and the like. An efficient capital raising process has huge network effects which go beyond the process itself."

The firm expects the industry to adopt a hybrid remote/in-person fund raising model, once the world emerges from the throes of the pandemic. "There is real value in meeting in person and iConnections plans to host its Global Alternative Investment Conference in Miami in January 2022, in person. But in our view, fundraising will be a continuum, not just centred around events," Biscardi underscores.

In view of this, platforms such as iConnections can offer the consistency and regularity of contact ensuring that a PE manager doesn't need to fly half-way across the country or around the world, especially for those first few meetings. "A virtual connection is faster, more efficient, and leaves PE managers with more time for deploying that capital efficiently and looking after portfolio companies," Biscardi surmises. ■

Ron Biscardi
CEO, iConnections

Ron Biscardi is the CEO and Co-Founder of iConnections. Ron has over 25 years of experience in the alternative investment industry, and has closed over 20 seed deals and deployed over USD600 million in capital. His achievements include building the world's largest capital introduction conference which takes place annually in Miami Beach. In April 2020, he founded iConnections, an online community for alternative investment professionals with philanthropy at its heart. Funds4Food, the first event organised by iConnections, raised USD1.9 million for victims of the global pandemic. iConnections has hosted some of the largest events in the industry in partnership with AIMA and 100 Women in Finance.

Private capital investors pushed to invest in tech

AssetMetrix: Best ESG Solution Provider



As the need for transparency persists and private equity managers are pushed to integrate increasingly sophisticated tools into their processes, the importance of delivering high quality data in a timely manner is being thrown into sharper relief.

"As limited partners (LPs) and regulators demand greater transparency and insight, fund managers are under pressure to adopt reporting technology to satisfy these demands," explains Moritz Haarmann, Head of Product Development, AssetMetrix. "The trend for digitisation in private capital has been in action for several years, but it has come into the spotlight even more over the course of the past year. Covid has forced private capital investors to adapt and invest in technology in order to maintain or even create operational excellence."

He notes PE firms are using technology to ensure manual tasks are streamlined and automatised. This is particularly relevant given private equity has historically been a relatively low-tech industry.

Technology solutions can also support communication between LPs and GPs. As remote working has emphasised the importance of interaction, tools which boost collaboration and improve reporting standards are becoming critical to the industry.

Haarmann notes: "Timeliness of access to data is a challenge, PE managers are facing. They need to focus on timely delivery and high quality data. To this end, AssetMetrix supports closer interaction by providing a platform on which data can be exchanged. Through this, insights can be gained to create greater transparency, bringing both sides together."

However, despite efforts being made to improve data exchange, the actual accessibility of the information remains a challenge. Haarmann comments: "The complete availability of data is one of the greatest challenges of illiquid market segments as this cannot be guaranteed to the same extent as in liquid markets.

"This in turn makes it necessary for the models used to be based on procedures which are as robust as possible and can deal with the challenging data situation in the private equity sector. Portfolio analytics are an important basis for optimising private equity portfolios as continuously as possible. Since numerous data from different sources have to be aggregated and analysed for this purpose, a complete package such as the one offered by AssetMetrix is considered the optimal solution."

On the technology side, Haarmann expects robotic automation in PE processes to continue growing in popularity: "Advances in this space will combine everything we see on the machine learning and AI front to deliver an enhanced level of efficiency in automation.

"Beyond this, we can expect trends already visible today, predominantly in the liquid-assets universe, to become more widely adopted in PE as well. These include data-driven investment decisions, self-optimising quantitative models and machine-reading from paper-like reports. All this on top of innovative cloud technologies will make functionality more scalable, more easy-to-adopt, more commodity-like."

In view of these advancements, it is essential for PE managers to have a partner who is focused on staying up-to-date with the latest trends and developments in the market, especially when it comes to technology. "AssetMetrix continuously improves its solutions and has specialists, like an internal quant team for analytics, to develop the latest analytical models. Our internal IT team is constantly growing to ensure state-of-the-art service solutions," Haarmann concludes. ■

Moritz Haarmann
Head of Product Development, AssetMetrix

Moritz Haarmann is Head of Product Development and has been with AssetMetrix since 2013. Before joining AssetMetrix Moritz worked in banking and has 10 years experience in the PE industry. He holds a master's degree in business and a master's degree in political science.

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Focusing on effective digital transformation

RFA: Best Cloud Services Provider

Digital transformation can create efficiencies within a business, increasing visibility of data and reducing cost. However, it is crucial that any digital transformation is approached correctly, as a poorly executed strategy can lead to significant business disruption.

"An effective digitisation process is built on an effective data strategy. An end-to-end managed data solution is usually the most effective approach for a PE firm," explains George Ralph, Global Managing Director at RFA. "A data warehouse will separate the layers of PE managers' data via any public cloud provider; AWS, Azure or Google Cloud. The managers are then able to scale their data and separate data processing and storage. This will allow them to harness that data for deal making and key investment decisions."

Data governance, ingestion and analytics solutions are built to meet the standards of institutional investors and global financial regulators. They can automate processes which historically have been lengthy and burdensome.

The key trend around how the industry manages data continues. Ralph comments: "As more and more people get involved in their data journey, they will discover a greater number of anomalies in the patterns of their behaviour as a business, in how they operate and also within the functions of the business.

"Alongside those starting out, firms that have already embarked on their digitisation journey are in phase two of their delivery now. We are seeing firms data scraping into their data warehouse to then review the KPIs on that data in order to see how that impacts their funds performance."

Another strong focus is around collaboration. "If a firm has multiple systems, the answer isn't to integrate those systems, it is to pour all the data from every system into a data warehouse. From here, a firm can assess where the burdens to their business lie and what can be potentially automated, via the assistance of a data management dashboard," outlines Ralph.

A focal point for RFA themselves this year is using the opportunity of the massive shift in working conditions to develop a better understanding of ESG and how RFA as a firm can deploy an even more successful policy within its own business. "Business travel is a great example of this," observes Ralph. "Before 2020, I for one seemed to always be in flight somewhere. RFA has nine global locations across



three continents and as Global MD, I have a responsibility to each and every one of our 300 plus employees worldwide. Covid has taught me new ways to communicate and collaborate to still get the job done, just remotely.

"Remote working, or satellite office working, can offer a significant impact on our ability to give back to the environment. We have learned how to get deals done and manage workflow without the ability to stand up at our desks and catch the attention of a colleague across the office, or meet a new investor in person at our offices. Investors are now not only interested in the ESG impact of their investments but also in the ESG impact of their investment management partners, so a firm must look at how they can reasonably make their own contribution. The data and collaboration business technology that has emerged allows us, and our clients, to be able to do this." ■

George Ralph
Managing Director, RFA

George Ralph CITP, has successfully founded three technology firms along with C-level advisory services include M&A to numerous firms. George is a true leader and has been managing teams internationally, and leading technology transformation projects for over 20 years. A certified GDPR, Cyber assessor, Auditor, Architect and widely experienced cybersecurity and RegTech professional, George has extensive technical experience in network and server architecture, large scale migrations utilising leading technology brands, and IaaS offerings.



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Accurate data and analysis determine investment success

CEPRES: Best Data Management Solution

Demand for rigorous and in-depth analysis of complex investment strategies is growing exponentially as more capital is allocated to private markets. In this environment, access to accurate data down to single asset levels is critical to support insightful analysis, and investors with this access can achieve better investment outcomes and possess a distinct advantage.

"Different industries can differ heavily in their risk/return outcomes and various private equity strategies will deliver varying degrees of success," comments Dr Daniel Schmidt, CEO & Founder at CEPRES. "Only those with access to the right data and investment analytics will be able to effectively navigate this evolving and challenging investment environment".

In the wake of the Covid-19 pandemic, more insight driven portfolio decision management, based on granular, asset-level data evolved from a nice-to-have to a must-have almost overnight. "The understanding of how operational developments of portfolio companies were impacted by Covid and the effect on future investment outcomes became highly relevant to all investors. This is especially true for fund investors who are indirectly exposed to thousands of companies through the funds they invest in," underscores Schmidt.

Over the course of this year, front- and mid-office departments close to the investment office (e.g. strategic asset allocation, risk management and regulators) demanded more detailed analyses based on this look-through. "Investors, who did not have the corresponding data access, were flying blind, looking through a dirty window and not sure if they could be heading towards a crash situation. They lacked transparency to truly understand how Covid would impact their current portfolio and how best to manage future allocation decisions. Meanwhile investors running their investment operations on CEPRES were well prepared because they already had full transparency and up to date accurate data and predictive models to quickly make decisions," Schmidt highlights.

The need for data and technology will only become more pronounced, as the asset class continues to grow. He continues: "Since the private markets asset class has become a significant part of their AUM, institutional investors as limited partners (LPs) need to apply more active portfolio management to help protect their investment decisions, rather than only traditional portfolio monitoring reporting overviews.



"Investment professionals in these organisations are highly skilled, but often under-resourced relative to the AUM they manage. Fast and accurate access to their data and targeted, integrated investment technology empowers them to meet increasing demands from internal and external stakeholders. This in turn helps them be more effective and grow their careers by leveraging technology to smooth the path to increasing allocations."

CEPRES is constantly enhancing their data management technology while also improving data access for its investor clients. Better data is the differentiating factor but Schmidt also highlights: "Building intelligence of how to analyse those data to drive investment decisions in the right direction is another pillar of our business. We enrich our portfolio management and due diligence solutions with analytical power that transform accurate, but raw data into true investment decision knowledge."

CEPRES was founded on the vision to empower private market professionals to make better investment decisions through technology and better data access. The firm's mission is to provide investors, the best solutions built on our secure data network to make informed decisions about their current portfolios and uncover new investment opportunities that lead to better investment outcomes. ■

Dr Daniel Schmidt
CEO, CEPRES



Daniel Schmidt is the CEO and Founder of CEPRES. He has more than 20 years experience in private equity investing and corporate business development. Before founding CEPRES, Daniel served as Managing Director at Deutsche Bank Private Equity Partners and led the buyout of CEPRES from Deutsche Bank in 2010.

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SS&C Advent: Best Accounting & Reporting Software

Hedge fund managers actively invest in private equity and launch funds to satisfy investors' demands for better returns. To succeed, hedge funds need a multi-asset class system with robust private equity capabilities to support their investor pools.

"There is a need for more investor reporting across funds – hedge and private equity combined. We have observed this trend developing over the last few years in our private equity technology and fund administration business. On the technology side, we have built out private equity partnership accounting to support our clients," outlines Daniel Leader, a solutions consultant at SS&C Advent.

As the private equity industry has grown, the structures for PE funds have evolved. SS&C Advent has expanded Geneva's fund structure accounting capabilities to accurately account for complex structures with feeders, masters, blockers, AIV, and SPVs. The Geneva World Investor solution provides partnership accounting and servicing for both onshore and offshore funds, supporting unlimited fund structures such as hybrid and closed-end funds, private equity, and single-managed accounts. "We have clients with over 60 legal entities in a structure who are leveraging our system to either shadow their administrator or report to end clients," Leader notes.

SS&C Advent offers a single solution to managers for both open-ended and closed-ended funds in the same platform. "This is a differentiator," highlights Leader. "We expect significant growth in the PE industry with more start-ups and private companies launching this year. We will see even more trading in debt, whether it's in syndicated loans or private loans."

Systematically accounting for asset classes like loans is a significant challenge for GPs. So are tracking and reporting on investor capital activity and calculating management fees and waterfall distributions. Fund structures are becoming more complex. Having a solution to automate the support and provide investor accounting with look-through reporting for investors is critical.

SS&C is well-positioned to provide robust portfolio, fund, and investor accounting and administration for the PE industry. The ability to handle a broad range of asset classes – from simple equities/portfolio companies to complex asset classes like bank debt – is particularly relevant



in the current environment as PE managers continue to diversify their asset mix.

"Closed-end/private equity will remain a key focus for SS&C Advent," Leader states. "We see this as a growth area for our business and plan to build out more features in this space. We want our clients to manage their back-office operations systematically and automate investor balance and fee calculations, helping reduce the risk of user error," he said. "

Leader believes funds can benefit by implementing Geneva via its cloud delivery model, lowering IT cost of ownership. "By offering additional operational services in a co-sourced model or on a fully outsourced basis, we enable clients to keep costs low and utilise their staff for more functionally beneficial tasks." ■

Daniel Leader
Solutions Consultant, SS&C Advent

Daniel Leader joined SS&C Advent in February 2019 and currently holds the position of Solutions Consultant. With 20 years of experience in the fund and alternatives industry, he has a deep knowledge of operational frameworks and is responsible for delivering world class technology and service solutions to Alternative Asset Managers. Prior to working for SS&C Advent, Daniel worked for Barclays Global Investors before transitioning to the Hedge Fund industry in 2006 where he worked for Winton Capital for 12 years, leaving as Head of Fund Accounting & Valuation.

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Fast paced changes require real-time forecasting

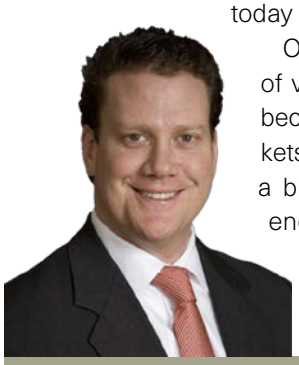
Lionpoint: Best Technology Advisory Firm

The changes and uncertainty which have come to light in the past year, coupled with the increasing speed of the private equity industry, have highlighted the need for faster, more reliable data to enable real-time forecasting and portfolio monitoring, accounting fund administration and performance.

"Clients recognise that having access to reliable data enables a better understanding of the different aspects of their organisation. It also supports efforts to enhance business relationships and deal making," explains Nick Moore, Co-founder and Executive Director at Lionpoint. "With accurate and up-to-date data, they have a better understanding of their deal sourcing, deal pipeline, who their best lenders are, the best partnerships, and they can cultivate and build stronger relationships with their investors."

Moore notes clients are now viewing their challenges at a more macro level. In the past, they would approach Lionpoint for an implementation, after having selected the technology they wanted, to solve a specific problem.

"We are increasingly working with clients on operating model assessments, reviewing their operations across the front, middle and back office. The result is a target operating model that takes account of the people, processes and technology required to deliver on the company's strategy, and an 18–36-month plan of how to get from where they are today to where they need to be."



Over the years, a growing number of viable technology solutions have become available to the private markets industry. As a partner that has a broader view and deeper experience of the technology solutions available, Lionpoint is helping clients define their technology strategy and review the best solutions available to meet the business' needs.

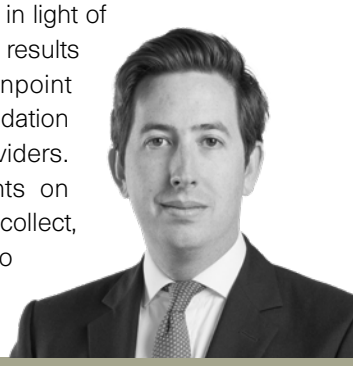
The firm has been growing rapidly and partnering with technology solutions focused on the private equity industry, as well as those that are industry agnostic. "Our business continues to evolve so that we can provide the industry and technology expertise for the changing needs of our clients. This has included increasing our team's experience across data and analytics, modelling and forecasting, and business process automation to match the expansion plans of clients," Giles Travers, Managing Director at Lionpoint, delineates.

Travers expects private equity firms to become more complex as they offer their clients products across multiple geographies, asset classes and regulatory / legal structures. In view of this increasing complexity, technology will play a huge role in determining how they compete, and the value they can offer.

Technology is a challenge for both general partners and limited partners. Said Travers, "Firms need the right talent that understand the right technologies to enable business as well as a core team to execute on digital transformation.

"Both GPs and LPs need to have a more strategic approach to technology. Rather than viewing it as a separate function, it needs to be seen as an enabler to doing business which can help deliver on the firm's vision."

From its perspective, and in light of its ambition to deliver great results and data for clients, Lionpoint has developed a solid foundation of technology service providers. The firm works with clients on their internal processes to collect, review, and approve data to be used effectively. ■



Nick Moore
Co-founder & Executive Director, Lionpoint

Nick Moore is a Co-founder & Executive Director at Lionpoint Group, responsible for global business strategy and execution. He has over 25 years' experience in global financial services, private equity and real assets along with extensive front-to-back-office strategy, operations and technology expertise.

Giles Travers
Managing Director, Lionpoint

Giles Travers has over 17 years' experience working with leading global investment managers and financial services firms in respect of strategy, technology, and operations. At Lionpoint, he has a specific focus on alternative investment operations (private equity, venture capital, private debt, fund of funds), digital and technology transformation.

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Leading the charge to make DEI a core objective

Jensen Partners: Best Recruitment Company for Investor Relations & Asset Raising



Diversity is increasing across the private equity industry as firms are launching new strategies and building new teams, meaning they are recruiting and hiring talent in large numbers. This is happening as general partners (GPs) and limited partners (LPs) call for greater transparency and accountability on diversity, equity and inclusion (DEI).

"Across the board, PE firms are working to establish and/or improve their commitment to DEI values," outlines Sasha Jensen, CEO and founder, Jensen Partners. "We've seen demand for diverse candidates grow across PE to the point where many firms are creating diverse candidate pipelines and dedicating significant HR resources to finding talent that better represents the communities and clients they serve."

In response, Jensen Partners has taken two very aggressive steps. The first is that DEI is now a part of every talent search the firm conducts. Jensen elaborates: "Over the past few years, our clients have increasingly requested that we recommend more candidates of diverse backgrounds. Hearing those calls, we upped the ante.

"Now, Jensen Partners will not conduct a search unless our client agrees to including at least 51 percent diverse candidates in the first round of the search. For us, that is a bare minimum a firm can do given the pervasive ethnic and gender under-representation across the industry."

The firm has also developed a propriety diversity talent pipeline that includes over 8,000 alternatives professionals who have self-identified as belonging to one or more under-represented groups. "To do this, we built an enterprise software platform, called Diversity Metrics, which tracks the employees of every private equity platform alongside rich diversity analytics, allowing us to identify rising stars and rainmakers across the industry," Jensen explains.

To date, LPs and GPs have relied on pledges and self-reporting. The tech-enabled, data-driven platform brings verified DEI data to the table and is poised to bring meaningful transparency on DEI values to the PE industry.

One of the firm's main goals for 2021 is to educate clients on why DEI should be viewed as a core business objective. The Diversity Metrics platform provides the tools PE firms need to measure and improve workforce diversity and inclusion. "While we have seen many clients sincerely working to improve DEI, we are only just beginning to see firms elevate DEI objectives to the level of core business objective. This is problematic because the most common empirical finding we see as we review data from Diversity Metrics is that DEI programmes that are not given a mandate at the executive level tend to be less effective over the long term," she remarks.

Jensen expects the demand for talent in PE to continue increasing in 2021 and demand for diverse talent, which is already exploding, will rise dramatically. "Jensen Partners is well positioned to meet that demand because we have been ahead of the curve on identifying well qualified diverse candidates. As private equity firms build out new teams and product lines, our data-driven approach and a long-term perspective uniquely positions us for success in securing the right human capital." ■

Sasha Jensen
CEO & Founder, Jensen Partners

Sasha Jensen, Founder and CEO, launched Jensen Partners in 2012 with the focus on solely identifying the pre-eminent human capital talent for raising capital within the alternative investment industry. In fact, Sasha was described as "the most successful executive recruiter for asset gatherers" by Institutional Investor magazine. In 2020, Jensen Partners expanded its team to Europe with the addition of two senior professionals. In February 2020, Peter Mayer, previously a partner from PJT Partners, was appointed Head of Europe. The following month George Lewis was named Managing Director, Infrastructure practice in London. Over the last five years, Sasha's firm has received several rounds of institutional funding, experienced transformational growth and expanded to 14 professionals located in New York and London. Further, Jensen Partners' executive recruiting model applies a 'big data' approach to mapping out the entire fund distribution teams at the largest alternative investment platforms, totalling more than 600 firms.

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Bracing for changes driven by regulation

Wheelhouse Advisors: Best Accounting Firm

Private equity firms in the UK and Europe must brace themselves for significant change as a wave of new regulation is due to be implemented in January 2022 and UK firms understand how to continue marketing their funds across the EU in a post-Brexit world.



The implementation of the Investment Firm Prudential Regime (IFPR) in the UK in January 2022 and its EU equivalent, the IFR, later this year will impact all firms with MiFID permissions. "They can expect to see significant changes to their capital requirements and prudential governance arrangements, including a 'Pillar 2' requirement to conduct and document an Internal Capital and Risk Assessment or ICARA," comments Matthew Crisp, CEO of Wheelhouse Advisors. "We've been working with clients to ensure they are fully apprised of the changes, and to plan how any identified capital shortfall will be addressed."

Getting ahead of the increased capital requirements which will be introduced by the IFPR and the IFR is vital – particularly if any restructuring is required. "For new firms considering a launch, timing may be of the essence, in order to benefit from grandfathering provisions allowing the full capital impacts to be spread over several years," Crisp suggests.

Crisp also outlines how during 2021, UK AIFMs aiming to continue marketing funds in the EU beyond the transitional arrangements under National Private Placement Regimes will be undertaking their first AIFMD Annex IV reporting to regulators other than the FCA. In view of this, Crisp notes: "We've developed a great reputation over the years by applying our specialist Annex IV reporting overlay to fund administrators' standard NAV packs, and have been growing our regulatory reporting team in response to this development."

In this context, GPs also need to consider the extent to which the UK's regulatory landscape will diverge from that of the EU. Crisp details: "For example, ESG is high on limited partners' (LPs) agenda and, despite the Sustainable Finance Disclosure Regulation not applying directly in the UK, AIFMs marketing to the EU must comply. We are also seeing other clients voluntarily opting in to meet investors' demands for transparency around ESG and sustainability."

Crisp expects further start up activity in the industry in the coming year, as well as international firms establishing in the UK, as the Covid situation improves and now that Brexit has passed: "We anticipate significant demand for Annex IV reporting services as firms continue to market their funds across the EU. In fact, we have grown our team in preparation. We are already supporting established firms with their IFPR-readiness and with quantifying capital impacts in particular. In view of this, we are well placed to assist with their regulatory reporting and prudential governance requirements under the new regime."

Wheelhouse Advisors has a rigorous growth plan for the year ahead and has amassed vast expertise and knowledge in certain key areas, including regulatory and financial reporting requirements, prudential management and corporate tax. Crisp underscores: "We provide comprehensive advice for spinouts, start-ups and international firms establishing a UK presence, supplemented by the expertise and experience of our partner firms. We know what's coming down the line for our PE clients and we have the expertise and focus to help them steer through it." ■

Matthew Crisp
CEO, Wheelhouse Advisors

Matthew is the CEO of Wheelhouse Advisors, leading a successful MBO of the firm in 2020, from the ACA Compliance Group, where he was a partner. Matthew holds the IMC and is a fellow of the Institute of Chartered Accountants in England and Wales. He started his career in financial services with Barclays in Hanoi in 1994, joined PwC specialising in alternative funds and their managers, before joining Sigma Partnership as a Partner in 2009. Sigma became Cordium then HedgeStart before being acquired by the ACA Compliance Group.

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Diversification to continue at pace

Crestbridge: Best Fund Administrator – Technology

As diversification continued to be critical amid the general disruption experienced this year, private equity managers have sought increasing assistance to support their expansion across domiciles and asset classes.

"Diversification has really emerged as a key trend over the past year. This has played out in the funds space with funds managers diversifying across domiciles, asset classes and reviewing their key investment focus and investment strategies," outlines Alex Di Santo, Group Head of Private Equity Fund Services, Crestbridge. "A really good example is the increasing trend among private equity managers establishing SPACs (Special Purpose Acquisition Companies) to support their investment portfolios."

Di Santo also notes an increase in the number of debt funds being raised, in particular within the distressed, real estate and venture debt arenas.

In terms of services required on these dimensions, PE managers looking to enter a fund domicile for the first time, for example, would need support from an expertise perspective. "They will also need our support from a resourcing perspective given we are very much seen as an extension of their team," Di Santo says.

He expects diversification to continue at pace as managers hunt for yield in an increasingly competitive market: "This will include diversification by strategy and a focus on new niche sub strategies." The healthcare and technology sectors have seen considerable investment over the past 12 months and within these fields, one can identify examples of new strategies which have the potential to perform, such as investments in supply chain technology.

Commenting on the future of technology, Di Santo says: "The use of artificial intelligence and robotics will become more prominent both at client and service provider level as we together tackle the increased need for granular reporting and regulatory compliance. Artificial intelligence is already being used by managers for sourcing investments, investment due diligence and monitoring investor behaviours and this will increase."

Managers are also facing operational challenges in their efforts to meeting rising investor demands and increasing reporting requirements. Di Santo underscores: "There is also growing need for reporting in emerging areas such as ESG.



Managing large volumes of data is becoming increasingly challenging for our clients, and that's where technology is critical to facilitating the increased levels of reporting."

Technology is changing the private equity space and Crestbridge believes it's important to be well positioned so as to fully support clients for the long term. "As an organisation, Crestbridge has a very clear technology roadmap that sets out where we think the industry will be in 5-10 years' time, as well as our plans for the business during this timescale. We are a very innovative business and it's important that we continue to invest in technology and people," Di Santo points out.

The firm invested heavily in its platforms, and tailors, develops and supplements its technology to meet the needs of its clients. An example of this is its integrating specialised carry calculation, management fee calculation or debt servicing software which symbolises client driven customisation. ■



Alex Di Santo
Group Head of Private Equity Fund Services, Crestbridge

Alex Di Santo has over 17 years' experience in the financial services industry, and has significant specialist expertise in private capital covering private debt and private equity (spanning venture, growth and buyout). As Group Head of Private Equity, Alex is responsible for the development and implementation of Crestbridge's private equity fund services strategy including maintaining the highest levels of client care. He will have additional responsibilities in raising the business' profile in the private equity fund services space, as well as identifying and targeting new and strategically important revenue opportunities.



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Taking a leap of faith

Alter Domus: Best Fund Administrator (GPs with assets >$30bn)

Progress in technology is driving managers to create more complex private equity strategies and as products are globalised, the lines which historically were drawn between segments are blurring. There is also growing specialisation in the industry.

"As a result of this specialisation, managers are having to capture many more data points and therefore how that data is managed and reported on serves a huge purpose," details Tim Toska, Global Head of Private Equity at Alter Domus. "Limited partners (LPs) are demanding even more transparency, so general partners (GPs) need to have that information at their fingertips. There is a certain level of openness now which wasn't there historically."

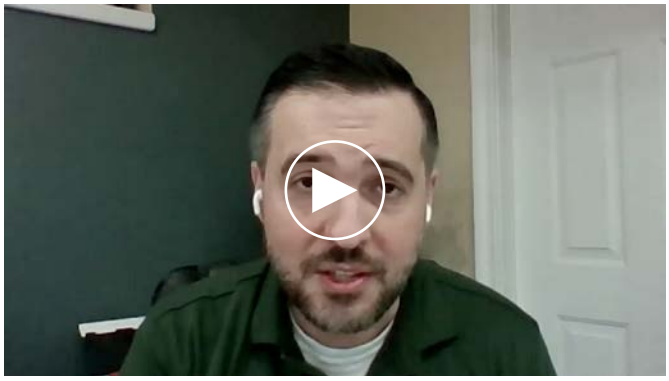
He says Covid accelerated these transparency requirements and also raised expectations around speed of response: "General partners were giving updates every week, which given the ability to process data, was now made possible."

In view of this, Alter Domus has been showcasing its CorPro technology with private equity clients. This is a secure web portal developed by the firm's technology and accounting professionals. It gives GPs real time, online access to data in a secure manner.

Further, cybersecurity has become a big part of the industry since sensitive information cannot be shared over email or phone calls. Therefore, communicating and sharing data through a secure portal is very valuable. Toska outlines: "Different clients have different verticals, so such a platform can provide them with the ability to see their whole portfolio. It's a seamless, transparent technology solution which supports the back office and can be used throughout an organisation, through to the front office and for interacting with LPs."

Toska notes that the choice between developing tech solutions in-house or electing to partner with a service provider remains a key decision for managers to make. They will need to carefully assess their operations and the expectations of their clients before choosing a suitable technology and a cost-effective means of obtaining it. "Cost is a key component to consider; some managers will opt to develop in-house solutions and potentially risk a lengthy and cost-intensive development process while others will consider the support they gain in addition to the technology itself."

"When it comes down to it, clients starting new relationships with service providers are taking a leap of faith. Our operating model is people-focused. Although we make use of technology to provide added value, prospective clients need to ultimately believe in their partnership with us."



He believes the pandemic brought Alter Domus closer to its clients: "Although we're not seeing clients face to face, I would argue that many of our relationships are much stronger. It has broken down certain barriers. Managing the frequent requests, helping clients overcome challenges and responding to them swiftly has deepened those relationships."

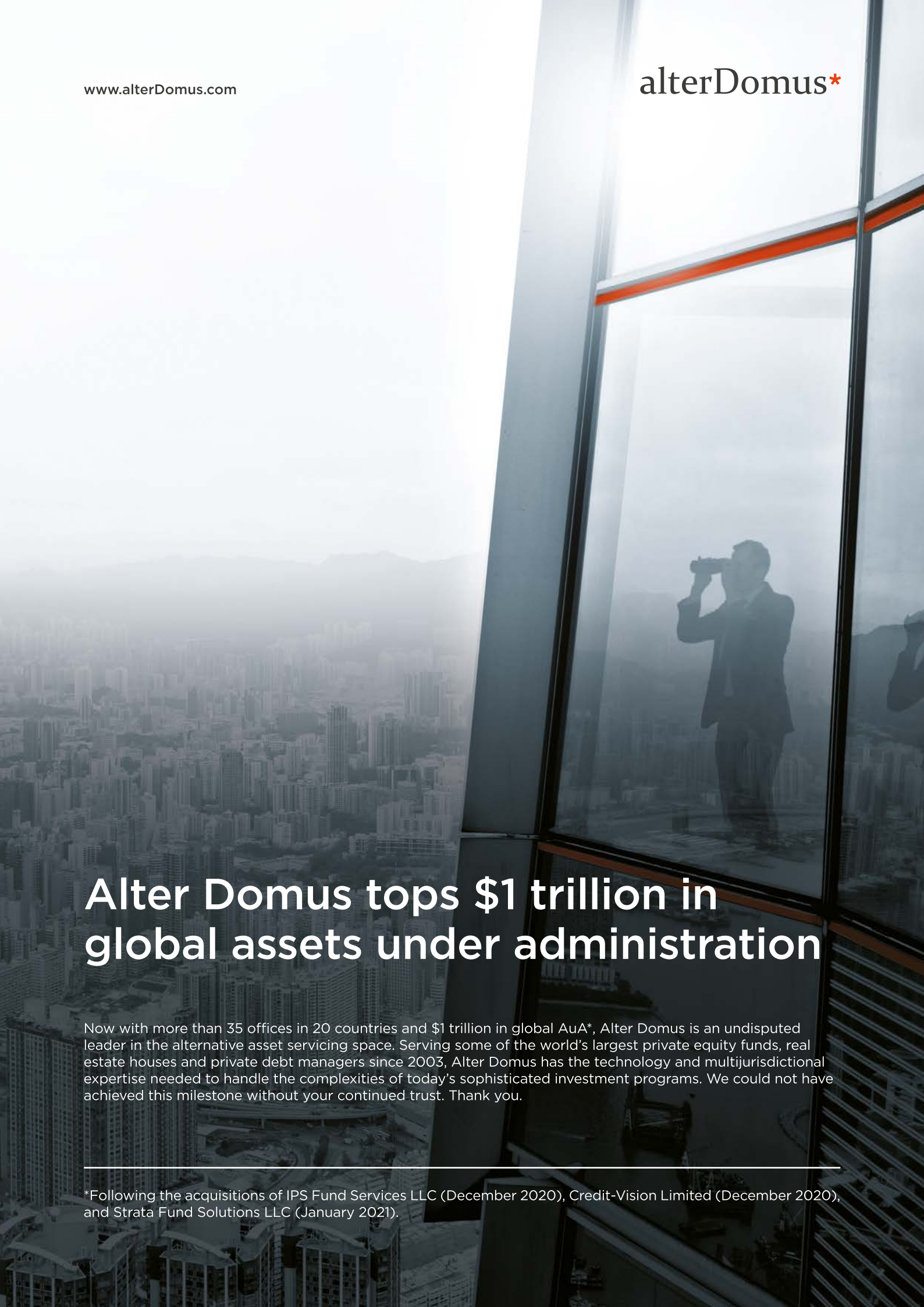
Toska's outlook for the PE industry is positive and he expects more complex funds and strategies to be brought to market. He also anticipates a need for more technical support: "Things like the ESG reporting service are going to be in the foreground a lot more. Clients will need help understanding the regulations and making sure they have all the support they need in that regard." Having access to a service provider active in multiple locations can provide a manager with cohesion and consistency.

In addition, the PE industry continues to become more global. Toska highlights: "We have offices in various locations around the world and have the capability to service clients from any of them." ■



Tim Toska
Global Head of Private Equity, Alter Domus

Prior to becoming Global Head of Private Equity, Tim was Managing Director and Co-Head, Private Equity Operational Leader, North America where he oversaw the private equity operations management team from the Darien, Connecticut office. In addition, he assisted on various operating initiatives and business development for the firm across Private Equity, focusing on fund-of-funds. Tim was a Director at Carta Fund Services, which became part of the Alter Domus Group in 2017. He was responsible for managing fund engagements and leading various business development and operating initiatives for the firm.



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*Following the acquisitions of IPS Fund Services LLC (December 2020), Credit-Vision Limited (December 2020), and Strata Fund Solutions LLC (January 2021).

Upbeat outlook as digitisation continues

Options: Best Technology Infrastructure Provider



The outlook for the private equity market is particularly buoyant, with firms expected to increase their headcount and push hard on cost efficiencies. They will also be delivering digital transformation projects within a context of continued remote working environments. We spoke with chief technology officer at Options, John Bryant, as he discusses what digital transformation may look like for a private equity firm in 2021.

"The private equity firms we service have been aggressively migrating all aspects of their technology stacks to cloud-based services. As with other alternative investment vehicles, they increasingly want to focus on what they are good at and source, outsource or virtualise what they see as commodity IT infrastructure," outlines Bryant.

"We have witnessed a significant uptick in customers requesting assistance building, operating and securing their public cloud footprints. Typically, this adoption of cloud services has centred around Microsoft Azure and AWS footprints. It is clear to see outsourced cloud solutions are becoming more and more integral to trading, as PE firms appear to be forging ahead with their use of SAAS solutions for their critical business applications, data processing and analytics. In contrast, previously, this activity might well have been in-house developed and hosted on-prem or within a private cloud."

Over the last 18 months the firm's Cloud Services team has spent time innovating its managed offering for customers' hybrid and multi-cloud infrastructure needs. Options has also been enhancing its Support Desk tools, automation and orchestration layers, all of which are cloud-agnostic.

Bryant also addressed the shift to remote working:: "This transition to remote working presented our clients with challenges as they faced a range of security, communication, and collaboration issues, as their workforce had to adapt to work in ways they were not accustomed to.

"There has been significant focus on remote working – ease of use, the capacity and performance of collaborative, cloud-based solutions such as Microsoft 365 and specifically Teams, for example. Customers have either chosen to provide corporate IT hardware or have embraced BYOD (Bring Your Own Device) in order to provide the tools needed to work from home."

Options has seen significant growth over the last 12 months as the changing work environment has experienced an accelerated period of unimaginable developments. "We have proactively engaged clients in migrations to cloud-based solutions, and have implemented a number of specific VIP teams and initiatives to ensure a continued dialogue with clients so that we could best support them through various stages of their remote working journey.

"The impact of Covid will continue to be keenly felt, and whilst most businesses have reaped the rewards from migration to Teams, Webex or Zoom, they have acknowledged that more work is needed to ensure that their staff can communicate as effectively as if they were back in the office," Bryant notes. ■

John Bryant
Chief Technology Officer, Options

Options' Chief Technology Officer joined in 2008 with his initial focus on the revamp of our low-latency market data product portfolio in addition to managing the company's global data centre expansion programme. In addition to leading our engineering practice, John advises clients and prospects on industry best-practice design. With over 20 years Capital Markets experience, John has a wealth of knowledge stretching across technologies such as ultra-low latency trading infrastructure, application architecture and cyber security. Prior to working for Options, John was IT Director for Insinger de Beaufort, a wealth management firm, where he deployed turn-key voice and data network solutions as well as overhauling front, middle and back office architecture (STP).



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Recruitment in private equity is evolving. Managers want to build holistic relationships with recruiters who have a greater understanding of their business.

This is particularly relevant given the current environment. "It has been well-documented that there are record levels of capital available for investment and as such, private equity firms seem to be intent on navigating the post-Covid world with ambition and vigour," observes Khuram Bajwa, Partner, One Ten Associates. "There is a genuine belief that deal activity will continue to scale without compromising the value and returns being delivered to limited partners (LPs). This leads to continued demand for finance and accounting professionals across the board."

He notes how the firm is also seeing an increase in funds utilising and embracing technology: "This is being reflected in the hunt for talent as specific systems knowledge/experience is now at the forefront of many searches.

"With a growing number of fund launches, existing funds continuing to make waves in their respective markets and the growing expectations of investors, this all points to a period of sustained growth and thus steady demand for quality candidates."

Although 2020 was a challenging year, One Ten Associates was able to succeed and build on its brand in ways which perhaps had not previously been viable. Bajwa comments: "Indeed, hiring patterns have certainly shown signs of recovery in the first quarter of 2021 and our teams are actively engaged on mandates across our different practice areas, namely finance, operations, legal & compliance, investor relations and marketing. We have been encouraged by the continued engagement while also working towards our core objectives of being seen as a trusted and credible thought-leader in our space."

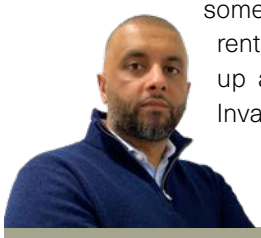
He outlines that 2021 so far has seen a very strong start form a recruitment perspective. The year appears to be on course for a busy and interesting time within the PE space which hopefully leads to an ongoing demand for talent. "We are already seeing a steady demand for fund and corporate accountants while additional areas such as transaction support, portfolio monitoring and ESG-related areas continue to be key themes driving the demand for talent. One Ten Associates continues to work closely with clients to stay informed and ensure that we are identifying talent specifically in line with whatever challenges our clients are facing," Bajwa says.

One such trend is the increase in investor sophistication. This has led to funds being more focussed on building or adding to their portfolio monitoring functions. The delivery of incisive and commercially-viable analytics continues to be a key deliverable and CFO/COOs are more dependent on this level of analysis being produced. "As funds have access to larger sets of data, it is becoming more and more key to be able to convert data into information. That is where the value is for may of our clients."



Bajwa also identified a rise in the number of first-time funds seeking to appoint their first operational hire: "Depending on the scale and nature of the fund, the debate is usually whether to go for an experienced CFO/COO profile who has presumably 'seen it all before' or an up-and-coming profile with the hunger and capability to grow into the role.

"More often than not, and in line with the client's needs, our advice has been to focus on up-and-coming talent i.e. someone operating as a number two currently with the desire and drive to step up and take ownership of a function. Invariably, this suits all concerned." ■



Khuram Bajwa
Partner, One Ten Associates

Khuram Bajwa joined One Ten Associates in January 2016 as a Partner to build out our Private Equity, Real Estate and Debt Practice, focusing on finance and operations recruitment. Prior to joining One Ten Associates, Khuram spent almost 6 years working within the recruitment space where he successfully built out and managed teams focusing on senior level recruitment across the Alternative Investment space. Khuram has developed and nurtured relationships throughout his time in recruitment with a range of professionals within his areas of focus. He continues to run a successful private equity industry networking event on a quarterly basis, attended by clients and candidates as well as lawyers, placement agents and advisors in the industry.


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Differentiated support in view of changing needs

ACA Group: Best Regulatory & Compliance Firm

Fundraising is expected to increase in the second half of 2021 into 2022 and as private equity firms face challenges on various dimensions, support that blends practical and regulatory advice is becoming critical.



"Despite the early economic impact of the pandemic and the inevitable pressures felt by the PE industry both at a firm and portfolio company level, the industry has emerged relatively unscathed and appears well positioned as the global economies continue to rebound. We've already seen a sharp increase in deal-making as firms return to previously shelved transactions," outlines Adam Palmer Partner at leading global governance, risk and compliance advisor, ACA Group (ACA).

With the historic lines between PE and other industries continuing to blur, ACA has blended its knowledge of market practices from across the financial sector (hedge funds, direct lending funds, securitisations, illiquid markets, public markets) to provide a service that covers all possibilities, while retaining a practical commercial approach for PE firms.

Palmer discusses the trends currently driving the private equity (PE) market: "We have seen an expansion of strategies due to early pandemic impact on the economy, such as quickly raised distressed/special situations funds or more targeted sector focused pools of capital. These expansions have led to a greater emphasis on conflicts of interest and MNPI considerations.

"Firms have also expanded their universe of investment opportunities within existing strategies across the capital structure, in accordance with contractual obligations, to include loans and bonds which in turn bring their own information barrier considerations and reporting requirements."

In addition, throughout 2020, PE firms carried out focused reviews of portfolio companies and their specific needs. Palmer explains: "This requires consultants to dive deeper into the structures of investment vehicles providing a greater level of practical advice and support on governance issues across the portfolios rather than simply advising on the implementation of EU wide directives and regulations."

ACA Group's response has been to build a service offering that blends practical and regulatory advice, to take into account far more strategic and operational considerations. "This has, in turn, developed a more nuanced approach for our clients, incorporating firm specific processes while also adjusting for wider market trends and best practices as appropriate," Palmer notes.

And as the fundraising drive continues, ACA is positioned to support clients with its marketing review offering. This aims to take the time-consuming strain of reviewing multiple strategy and investment decks from in-house compliance teams via the firm's managed services.

PE firms also face numerous regulatory change challenges, namely new, prudential compliance rules and the transition away from LIBOR. In addition, Palmer says: "We also see some signs that regulators are, once again, casting a gaze across the entire private markets space and questions have been asked, albeit quietly, about the way individuals are selected when taking on board seats.

"Time will tell if this does actually signal the start of a deeper look at the market but with an emphasis on governance structures in the UK post the Senior Managers and Certification Regime, it cannot be discounted, and we are monitoring the situation closely." ■

Adam Palmer
Partner, ACA Group

Adam Palmer is a Partner with ACA Group and leads the UK Regulatory Practice. He maintains a portfolio of clients and manages a team of consultants providing Financial Conduct Authority ("FCA") and US Securities and Exchange Commission compliance support to UK-regulated companies. These firms include hedge and traditional long-only managers, private equity companies, venture capitalist firms and MiFID investment firms. Immediately prior to joining ACA, Adam worked for the Permal Fund of Funds Group. While there, he focused primarily on the company's UK, Dubai, Hong Kong, and Singapore regulatory requirements. Before Permal, Adam served as Vice President, Legal and Compliance, for Centaurus Capital, a European event-driven hedge fund.



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Though the start of the pandemic in 2020 may have rocked the industry, many private equity firms went on to have a stellar year, with some raising record funds. As fund-raising activity and deal-flow increased, more general partners (GPs) sought support from their partners. The growing focus on risk management also led to more clients looking for risk advisory, hedge strategy execution and technology solutions.



"A key topic in the PE industry is the need for better technology solutions, both to enable PE managers to improve controls, risk management activities and other corporate functions, but also to improve reporting to limited partners (LPs)," highlights Haakon Blakstad, Chief Commercial Officer, Validus Risk Management.

LPs are increasingly asking questions about risk management and they are demanding more granular and timely information as part of performance reports. In addition, both GPs and LPs face the challenge of private assets having only recently become a mainstream allocation. This, in Blakstad's view means, "the industry is suffering from some growing pains when it comes to flow of information, streamlined operations and ordinary corporate functions."

To this end, with its focus on risk management, Validus enables managers to excel, both in terms of providing robust and practical risk management solutions and also in terms of the access, monitoring, analysis and reporting of data. In fact, the firm has continued to expand on its technology platform by adding modules for monitoring, reporting and analytics. This was not only done across risk management but also to keep track of assets, liabilities, and corresponding hedges. "We have also been looking to expand on our platform so our PE clients can provide additional support to their portfolio companies.

"Aside from technology, our advisory and capital markets divisions have been busy meeting PE clients' requirements for risk analysis, optimised hedging strategies, and assistance with fund finance facilities," Blakstad notes. This drive to continue improving and expanding the service it provides is critical to the firm's objectives.

Validus had a positive 2020, finishing the year with a 30 percent increase in revenue and a nearly 100 percent increase in headcount. A large part of the increase in staff was in the technology department. This was part of planned investment to further boost its risk management software.

The firm is also looking to grow in terms of geographical reach and range of clients. Blakstad notes: "We are opening another office in North America this year, New York, and will most probably be looking at Asia next. We are also seeing an increased demand for our service from LPs. This is predominantly in Europe and North America, so it represents an area of both growth and diversification for us. Growing our client base adds value to our existing clients, as the insight and sharing of best practices improves further."

He expects PE to continue doing well: "Funds will keep being raised and LPs will keep allocating more to this and other private asset classes. We will continue to support these clients through our consistent investment in technology and our desire to seek out problems and challenges we can solve for them. We will continue to live by our company strapline – Navigating Market Risk." ■

Haakon Blakstad
Chief Commercial Officer, Validus

Haakon Blakstad has more than 15 years' experience in financial services and capital markets, having previously worked in front office roles at Visa, Hoare Capital, and Société Générale. During his career he has built strong relationships with institutional investors and alternative investment managers globally, and in recent years has been instrumental in the delivery of risk management solutions to managers with several hundred billion dollars in combined AUM. Haakon holds a BA with honours in Business Management from Newcastle University.


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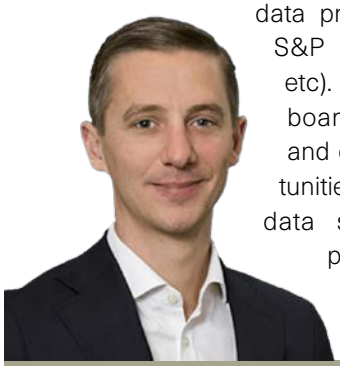
Technology key to well-prepared deal teams

DealCloud, an Intapp Company: Best Secure Workflow Management Provider

Despite operating almost completely remotely, in a post-pandemic world, many dealmakers are expected to become road warriors again. In view of this, technology will remain pivotal to ensuring they are coordinated and prepared for both on-site and remote meetings or due diligence.

"In an industry that's perceived as old-school, there has been a dramatic shift from unorganised Excel spreadsheets and scattered email chains to purpose-built technology for deal and relationship management," comments Matthew Hardcastle, Client Development Director with DealCloud. "Embracing this technology is ultimately improving private equity firms' bottom lines."

Data management will always be a challenge for firms because it involves a continuous cycle of change. DealCloud's technology solution makes it easy for firms to overcome this by enabling them to combine their own, proprietary data with a variety of third-party data providers (Preqin, PitchBook, S&P Global Market Intelligence, etc). They have access to dashboards which clearly compare and contrast different deal opportunities and portfolio performance data sourced from third party platforms.



"Additionally," Hardcastle notes, "in today's environment, LPs are consistently asking their GPs to show proof of progress on their ESG initiatives. It's important to choose a software solution that can be used to track firm-wide ESG initiatives and assist with automated reporting that keeps LPs – and the internal team – up to date."

As the pandemic pushed dealmakers to work from home, there was an instant need for capital markets professionals to connect virtually with their colleagues and a variety of stakeholders, including accountants, investment bankers, lawyers, business owners and more. "To do so, many firms implemented DealCloud for much-needed productivity and collaboration tools. This allowed seamless coordination across deal teams and investor relations," explains Hardcastle.

Also, Hardcastle outlines, "firms need reliable and secure access to data and institutional knowledge from anywhere – desktop, mobile and wherever they may be working while on-the-go. Through DealCloud's desktop and mobile apps, we make it possible for professionals to view dashboards, generate pre-formatted reports and more with the click of a button."

The firm was built by dealmakers for dealmakers and aims to continue serving their most critical needs, from business development and pipeline management, to investor relations and marketing, to conflicts management and reporting.

DealCloud's team knew industry professionals were frustrated by the fact that GPs and LPs historically saw brand name software platforms as their only options, despite the well-known limitations of those platforms.

Hardcastle pledges to continue building on the solutions currently offered: "We have a strong product roadmap that enhances existing features and makes it easier for dealmakers to manage transactions from origination to execution. DealCloud will continue to speak daily with prospective and existing clients to find out what they want and need, and adjust the product accordingly per their feedback."

For example, DealCloud is actively building out its conflicts management capabilities to help clients effectively manage risk and ensure compliance with evolving, stringent regulations. ■

Ben Harrison
Co-President, Financial Services & Founder

Ben Harrison has more than ten years of experience working in the investment banking, private equity and software end-markets. Prior to DealCloud, Ben worked for the Charlotte-based private equity firm Falfurrias Capital Partners and also in M&A advisory with Harris Williams & Co. and Edgeview Partners. Ben is a co-founding member of DealCloud and works alongside the team to help create and execute the organisation's vision as the pre-eminent industry-specific software solution for professionals in the private capital markets. Ben is a former director and board member at Reach for Excellence and Sustain Charlotte. He is also a member of the New York Global Shapers, an initiative of the World Economic Forum tasked with creating local programmes that will make a global impact. Ben is a graduate of UNC Chapel Hill's Kenan Flagler Business School and was awarded the William M. Rawls scholarship.

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