



The private capital buyers' guide to investing and fundraising platforms

A strategic resource for selecting AI-powered tech

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Selecting the right platform now sets the foundation for growth

In the early stages of growth, private capital firms make dozens of foundational decisions that shape how they raise capital, deploy capital, and scale. Among the most important — and often underestimated — is choosing an investing and fundraising platform. Many firms select a handful of generic tools to get started, but these quick fixes rarely support the complexity of financial workflows, and often make it hard for them to scale as they grow.

Private capital firms can now tap into AI-driven investing and fundraising solutions that are industry-specific and purpose-built — right out of the box. These solutions embed best practices drawn from thousands of peer firms, providing a proven blueprint for how high-performing teams operate across private equity, private credit, venture capital, and other private capital strategies.

The result? Built-in consultation and industry expertise, without the time or cost of starting from scratch.

But picking the right solution isn't easy — the market is flooded with options, and it's common to get lost in feature comparisons, price tags, and one-size-fits-all claims.

This e-book is designed to help your firm cut through the noise. It outlines how private capital workflows differ from traditional sales models, why generic tools often have hidden opportunity costs, and what to look for in a platform that supports today's needs — while setting the stage for long-term growth.

Because whether you're moving off spreadsheets or preparing for your next fund, your firm's ability to scale quickly and outpace your competitors starts with choosing the right tech the first time around.

The opportunity costs of generic CRMs

Many private capital firms initially gravitate towards traditional, generic CRM systems. That's because these systems — designed for transactional sales teams — can appear lightweight, inexpensive, and easy to deploy. This makes them attractive to lean firms looking to get started quickly.

But as private capital firms scale, this choice often results in hidden liabilities and opportunity costs. Traditional, generic CRMs lack the industry context, multi-relational data models, and flexible workflows required for the nuanced, long-term relationships that drive capital markets. They force teams to adapt their processes to the system — creating workarounds, duplicate data, and institutional knowledge loss.

These CRMs are built for industries that thrive on high-volume transactions and need to track thousands of leads through standardized sales funnels. But private capital firms operate in a world where relationships — not the sale of products or services — drive success. Teams

Generic CRMs have **opportunity costs**

-  **Siloed, incomplete information** → Impaired visibility and collaboration
-  **Manual data entry and workflows** → Inefficiencies and administrative burden
-  **Lack of AI-powered insights** → Suboptimal decision-making
-  **No real-time market updates or news** → Missed opportunities
-  **Manual processes** → Slower deals
-  **Need to customize and/or maintain your own tech** → Higher costs

juggle complex, multi-threaded relationships spanning investors, advisors, portfolio executives, and intermediaries. Generic solutions aren't designed to handle this ecosystem — they flatten interactions into static records and force professionals to manually piece together critical context.

Point solutions aren't enough

Some platforms offer relationship intelligence as a standalone solution — but when that functionality is disconnected from deal, fundraising, and execution workflows, the result is fragmented insights and limited value. These tools often lack fundraising capabilities, marketing support, task management, and flexible reporting — so firms have to cobble together multiple systems to get the job done.

Platforms built for private capital firms prevent this undesirable scenario. They map relationships across firms, people, deals, and timelines, automatically surfacing introductions and historic touchpoints, and evolving coverage strategies.

The result? Teams gain the relationship intelligence needed to move faster, act strategically, and drive growth without losing the institutional knowledge that makes them competitive — irrespective of fund size.

Industry-specific systems also focus exclusively on supporting what matters most to dealmakers: managing intricate networks of investors and intermediaries, tracking overlapping mandates, surfacing institutional insights, and helping teams move with speed and confidence.

With embedded best practices drawn from thousands of private capital firms, these solutions provide more than just technology. They deliver inherent consultation and guidance, helping specialty firms operate with the discipline of the largest players — without enterprise-level complexity.

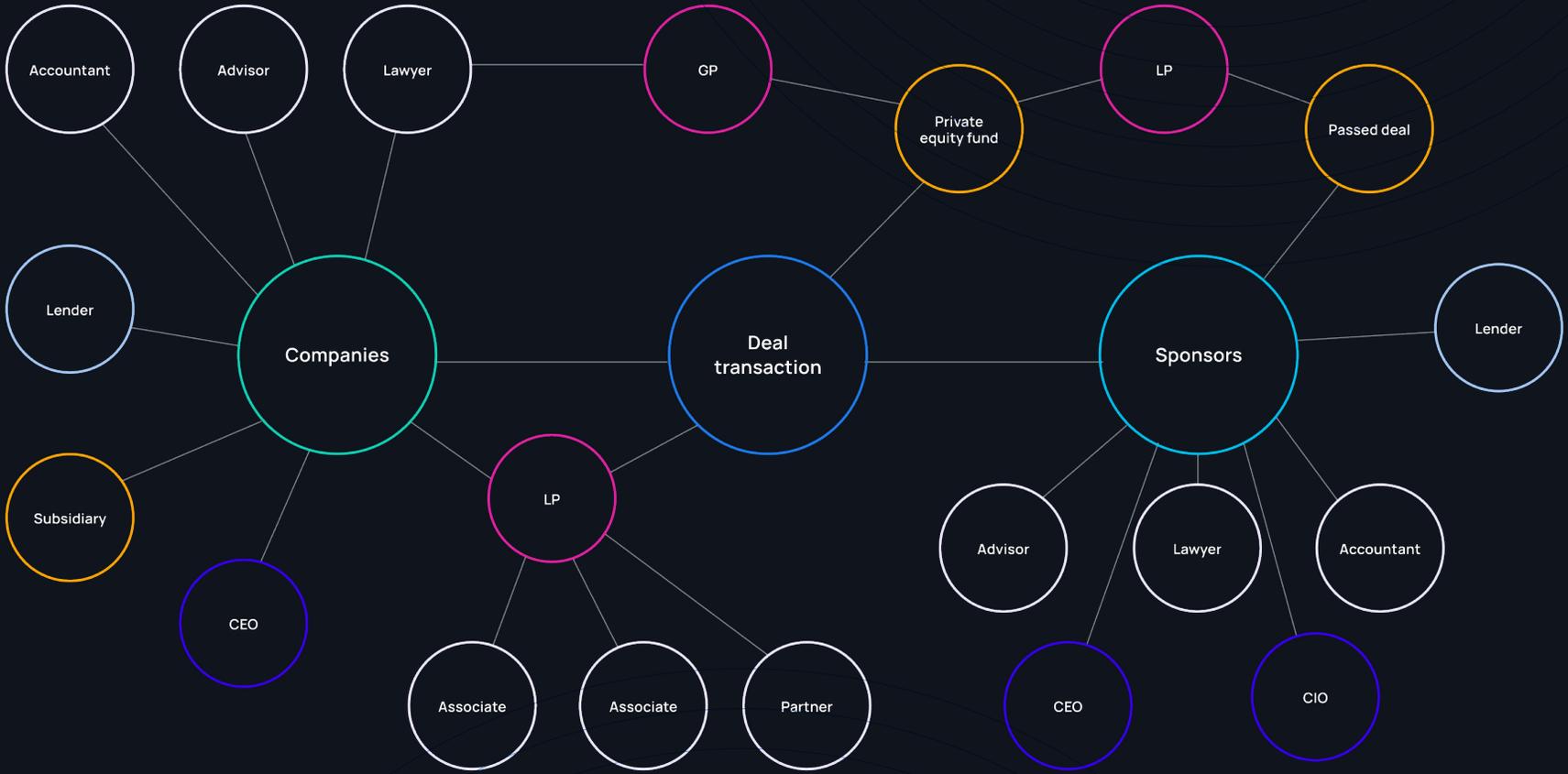
Tailored, end-to-end platforms accelerate business

While generic CRM providers divide their focus, industry-specific solution vendors double down on innovation, continually refining solution capabilities to help firms stay ahead. For growing specialty firms, this means faster time to value, fewer workarounds, and a scalable foundation.

With an end-to-end platform created for private capital firms, every feature — including relationship scoring, investor tracking, marketing workflows, and analytics — is integrated across the full investment and investor pipeline management lifecycle. The result is complete visibility, deeper automation, and the confidence to move faster at every stage, from origination to exit.

The firms that outperform don't settle for tools that are “good enough.” They invest in tailored solutions designed to originate, screen, and onboard more investors, and execute more investments across the deal cycle.

Complex relationships require purpose-built solutions



▲ Unlike generic CRMs, platforms like Intapp DealCloud are designed to manage multi-directional relationships

What a modern investing and fundraising platform should do

A modern investing and fundraising platform should be more than a digital Rolodex or pipeline tracker. It should serve as a command center for the entire deal lifecycle

— aggregating firmwide relationships, enriching them with AI-driven insights, and surfacing the right opportunities at the right time.

An AI-powered platform can help at every step

Aggregate
firmwide
relationships

... so you know who knows whom and how well.

Manage
fundraising
in real time

... so you can build investor trust and track fundraising momentum.

Surface and
prioritize new
opportunities

... so you find the right deals and focus on what matters.

Streamline
diligence and
execution

... so you collaborate easily and move deals forward faster.

Centralize
portfolio +
LP engagement

... so you stay connected and responsive.

Track exit
opportunities

... so you maximize returns and report with confidence.

Modern investing and fundraising platforms should also give professionals real-time visibility into fundraising momentum, empower precise investor targeting, and build trust with automated, personalized outreach. From early diligence through execution and exit, the platform must streamline collaboration, manage risk, and accelerate decision-making with transparency and accountability at every stage.

To support long-term value creation, it should also centralize portfolio engagement and investor communications – enabling confident reporting, deeper limited partner (LP) relationships, and sharper exit strategies. Ultimately, the right solution unifies people, data, and workflows to ensure every deal, relationship, and dollar raised is informed, intentional, and optimized.

Your platform should deliver an AI-powered advantage

Too often, firms adopt systems that demand constant data entry, manual clean-up, and constant workarounds – yet offer little in return. These tools become a burden instead of a performance multiplier.

In contrast, purpose-built, AI-enabled platforms are designed to automate value generation. They ingest data from Microsoft Outlook, third-party sources, and internal activities like meetings – then deliver real-time insights directly to your professionals. They also provide relationship strength scores – no manual work required. And, they remind teams to re-engage with key contacts, surface potential opportunities, and flag emerging patterns – without any effort on your part.

These capabilities are especially critical in specialty private capital firms where IT resources are scarce and teams own the tools they use. In these firms, if a platform can't make the team faster, smarter, and more connected without the help of a full-time system admin, it's not the right solution.

In short, an industry-specific solution shouldn't create more work. It should create a competitive advantage.

“Too often, tools become a burden instead of a performance multiplier.”

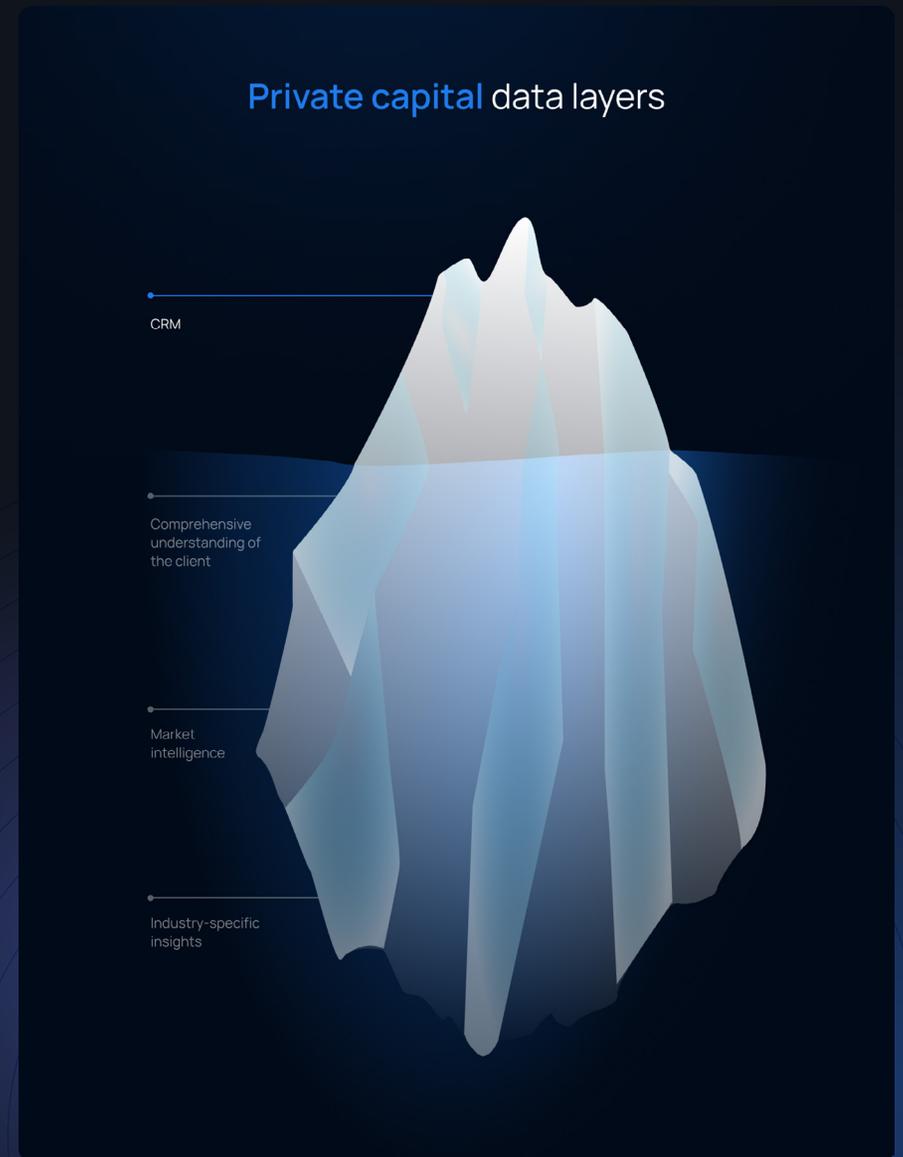
Data layers explained

The most valuable data your firm has is buried beneath the surface. It can be helpful to think about it like an iceberg: The visible layer is broad but shallow, while the vast, hidden layers support the entire structure. The firms that win are those that surface and apply the deeper, relationship-driven insights before their competitors even know they exist.

The visible iceberg layer: Publicly available data

Publicly available data includes company websites, social profiles, press releases, and any other information that can be scraped from the internet. Because everyone can access it, it provides little strategic edge. It's necessary but not differentiating.

Generic CRMs require users to spend their time manually entering and maintaining every contact, deal, and data point from these sources, even though it has low value.



Publicly available data is not differentiating for firms

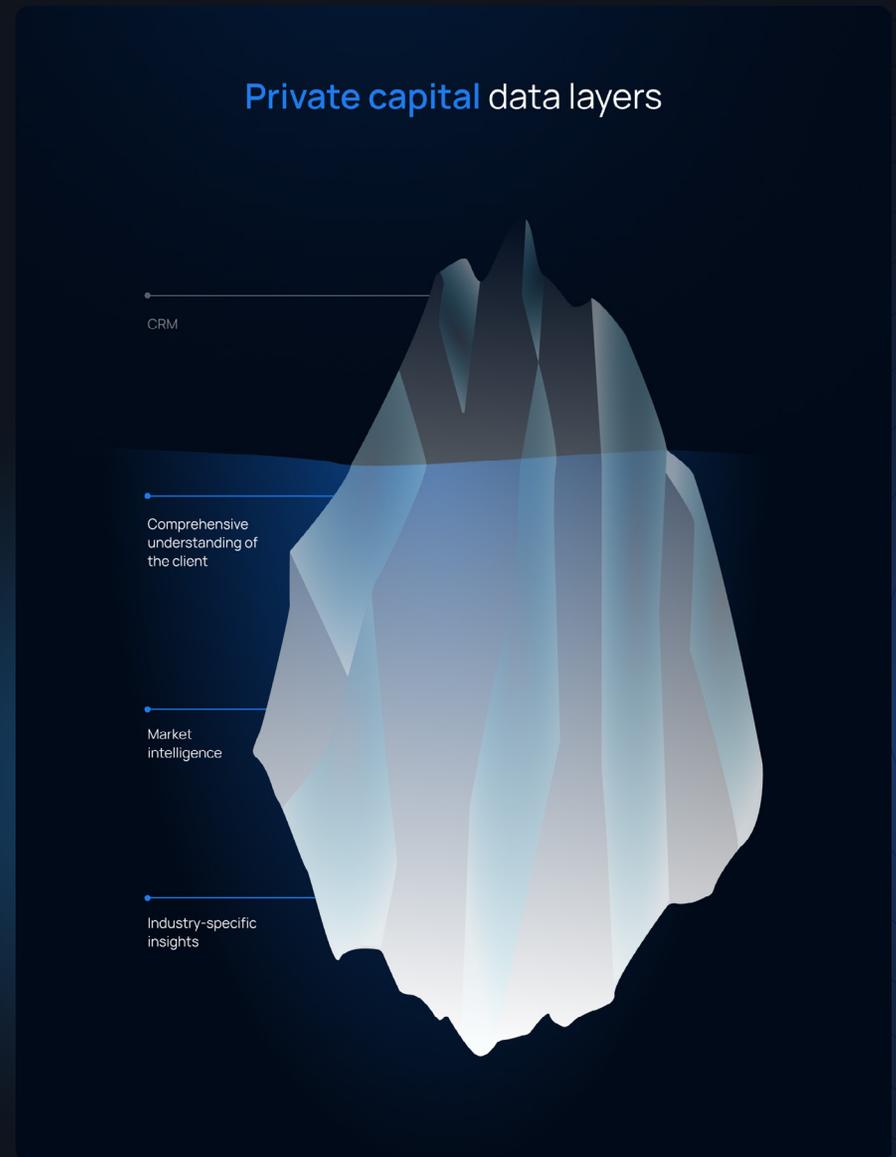
Beneath the surface: Licensed third-party data

Licensed third-party data from sources like PitchBook and Preqin provides deal professionals with critical market intelligence that helps them qualify opportunities faster, validate counterparties, and prepare for negotiations with confidence. It fills in gaps around firm activity, fund history, and financials so teams can move more efficiently and focus their energy on high-value, relationship-driven work. It supports speed and validation – not firm differentiation.

The depths: Proprietary relationship and interaction data

The highest-value data includes your firm's unique touchpoints and relationship intelligence, like meeting history, emails, historical deal information, internal notes, and warm introductions. Because this data is exclusive to your firm, it creates a true competitive moat when it's captured and surfaced properly.

Only tailored, AI-powered platforms can automatically ingest and enrich this proprietary data, then turn it into actionable intelligence that helps your professionals work smarter. This is where small firms can consistently operate with the intelligence, responsiveness, and institutional memory of firms twice their size.



▲ High-value, proprietary data is hidden below the surface

How to drive operational excellence

Prioritize flexibility and scalability

Every firm has the same ambition: growth. To manage more capital, raise larger funds, build stronger LP relationships, and generate higher returns while reducing risk and improving operational excellence. But growth requires more than just vision – it also requires infrastructure.

As firms expand, they face increasing challenges with tracking investor interactions, managing capital calls, reporting with precision, and moving in lockstep across teams. But a scalable, AI-powered investing and fundraising platform makes growth manageable. It gives firms the flexibility to bring on new team members, launch new strategies, and deepen LP engagement – without losing control of the process or sacrificing transparency. It also provides a big advantage during fundraising cycles, enabling firms to surface past interactions, track commitments, and respond quickly to diligence requests – capabilities that separate the firms that scale from those that stall.

This flexibility isn't just an operational benefit – it's what unlocks institutional trust and long-term capital.

Create a tech-first culture

Improving operational excellence and getting the maximum return on your investment requires creating a tech-first culture. This means removing the barriers that typically deter user adoption: lengthy implementations, unclear value, and systems that feel heavy before they deliver impact. A tech-first culture doesn't happen by mandate

“Flexibility isn't just an operational benefit – it's what unlocks institutional trust and long-term capital.”

– it happens when the right tools make the right way of working feel natural from the start.

Purpose-built systems with fast deployment help teams get started quickly, see value early, and build trust in the system organically. Because users can hit the ground running with relevant reports, workflows, and relationship views already in place, these systems become a productivity accelerant instead of just another project.

This ease of adoption creates early momentum and long-term discipline. Instead of retrofitting generic tools or waiting months for a system to take shape, firms can begin working in a structured, integrated environment from day one. This helps teams develop strong data hygiene habits and institutionalize knowledge while reinforcing scalable behaviors.

Provide adequate training

Equally important to building a tech-first culture is equipping teams with the confidence to use the system effectively from day one.

Many platforms include training programs designed specifically for financial professionals that provide step-by-step guidance tailored to real-world workflows. Whether onboarding a new analyst or refreshing a senior team member, firms have on-demand access to resources that accelerate learning and ensure adoption sticks. The result is less time spent figuring out the system, and more time using it to move deals forward.

When training is accessible, relevant, and role-specific, it becomes a performance multiplier instead of a hurdle.

“Less time spent figuring out the system means more time to drive deals forward.”

Understanding the true cost of ownership

When evaluating technology, it's easy to focus on the sticker price of a single solution. But the real cost of ownership includes far more than licensing fees. What often begins as an initiative to deploy a lightweight CRM can quickly become a much larger, more expensive project requiring an entire tech stack.

Choosing a generic solution means firms are forced to spend months scoping, customizing, and integrating software that was never built for the complex, non-linear workflows of dealmakers.

Perhaps even worse, fragmented systems create operational drag. Teams waste time switching between them, duplicating data entry, and resolving version conflicts. Visibility suffers, and institutional knowledge becomes siloed. Your firm slows down just when it's trying to speed up.

The opportunity cost isn't just time — it's missed deals, disconnected teams, and delayed insight into pipeline and relationships — which directly impacts revenue.

Many firms also discover that making their generic CRM work for their business requires bringing in consultants, implementation partners, or even dedicated internal resources to customize it for deal workflows, fund structures, and institutional relationships. What started as a low-cost, lightweight solution becomes an expensive consulting project.

That's why growing firms are moving beyond surface-level comparisons and asking, "What is this solution replacing?" A purpose-built system that works across critical use cases in sourcing, fundraising, execution, and relationship intelligence justifies a higher price point by delivering greater value, faster ROI, and fewer hidden costs.

You don't need more tools. You need the right platform — one that replaces complexity with clarity, and cost with compounding value.

“You don't need more tools. You need the right platform.”

Purpose-built platforms replace multiple systems



▲ The sticker price of a generic or point solution rarely includes the technology needed across the deal cycle

Proven, scalable industry solutions for specialty firms

Intapp solutions unlock competitive advantage

✓ Fundraising

✓ Investing

✓ Exiting

DealCloud platform – Originate, win, and execute more deals

Compliance – Accelerate deals while reducing risk

Collaboration – Close deals faster, with less friction

Powered by Intapp Assist and DataCortex with native integration across solutions

Intapp provides solutions designed specifically for private capital. They're built around best practices proven across thousands of firms, from market leaders to high-performing boutiques. Whether you're a private credit firm, venture capital firm, or family office, with Intapp you're not starting from scratch – you're starting with embedded expertise.

Because Intapp solutions reflect how the most successful firms in your space operate, they provide your teams with a highly intuitive experience that's aligned with their goals and tailored to how they work from day one.

This industry-specific approach dramatically shortens time to value. Preconfigured workflows for sourcing, fundraising, and execution tailored for private capital mean your firm can go live in just weeks – without relying on internal IT resources or heavy consulting support.

With purpose-built industry solutions like Intapp DealCloud, emerging firms can scale like the biggest players – while respecting the resource realities, growth ambitions, and competitive edge that defines the specialty market.

These firms can also accelerate and support their growth with AI-powered tools like Intapp Assist for DealCloud. Intapp Assist uses AI to embed real-time deal and relationship insights into your existing workflows, and recommends targets based on your firm's strategy and past activity – without any manual effort. Instead of relying on static lists or gut feel, teams can make data-driven decisions.

For firms looking to scale with confidence and clarity, DealCloud isn't just software – it's a growth platform. Up and running within just a few weeks, it gives your professionals the credibility and context to execute with confidence.

“DealCloud isn't just software – it's a growth platform.”

Lay the foundation for growth

Growing your firm isn't just about doing more — it's about doing it smarter and faster than the competition. Choosing an investing and fundraising platform isn't just a tactical decision; it's a strategic one that will determine how your firm scales, builds relationships, and competes in a data-driven market.

For specialty firms, it's about gaining access to the same institutional-grade discipline as larger firms, but without the complexity. Tailored, AI-powered systems based on how thousands of private capital firms operate can help your firm punch above its weight — so you can scale quickly, execute consistently, and stay focused on driving returns.

Firms that select the right platform from the start operate with greater visibility, move faster, and show up to every deal, pitch, and LP conversation with credibility and context. They're not buried in spreadsheets or stitching tools together — they're creating real institutional leverage. And they're not just reacting to what's next — they're ready for it.

Ready to scale with confidence?

Visit intapp.com/dealcloud to learn how you can set your firm up for success with a platform built just for private capital.